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ABSTRACT

Forum, published twice yearly, is one of a group of educational publications and teaching units provided for consumer educators as a public service by J.C. Penney Company and obtainable from a local store manager or J. C. Penney, 1301 Avenue of the Americas, N.Y. 10019. Since many people function as change agents, this issue was developed to bring together as much information as possible on the nature of change to help those involved in change efforts to be more effective in their roles. The articles include self-analysis instruments on one's attitudes toward change and trust, strategies for helping people convert controversy into creative change, and a six-step process for creative problem solving. Other topics are change agents as advocates or methodologists, stress and the agent of change, conflict as a climate for growth, and experiencing change in regard to self-knowledge. A worksheet for planning personal change efforts is included, with an annotated bibliography of materials dealing with affecting personal change and change in others. Also included are a list of resources in consumer education available on free loan from J. C. Penney and a descriptive order form for all their consumer education materials. (DL)

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Fall/Winter 1978

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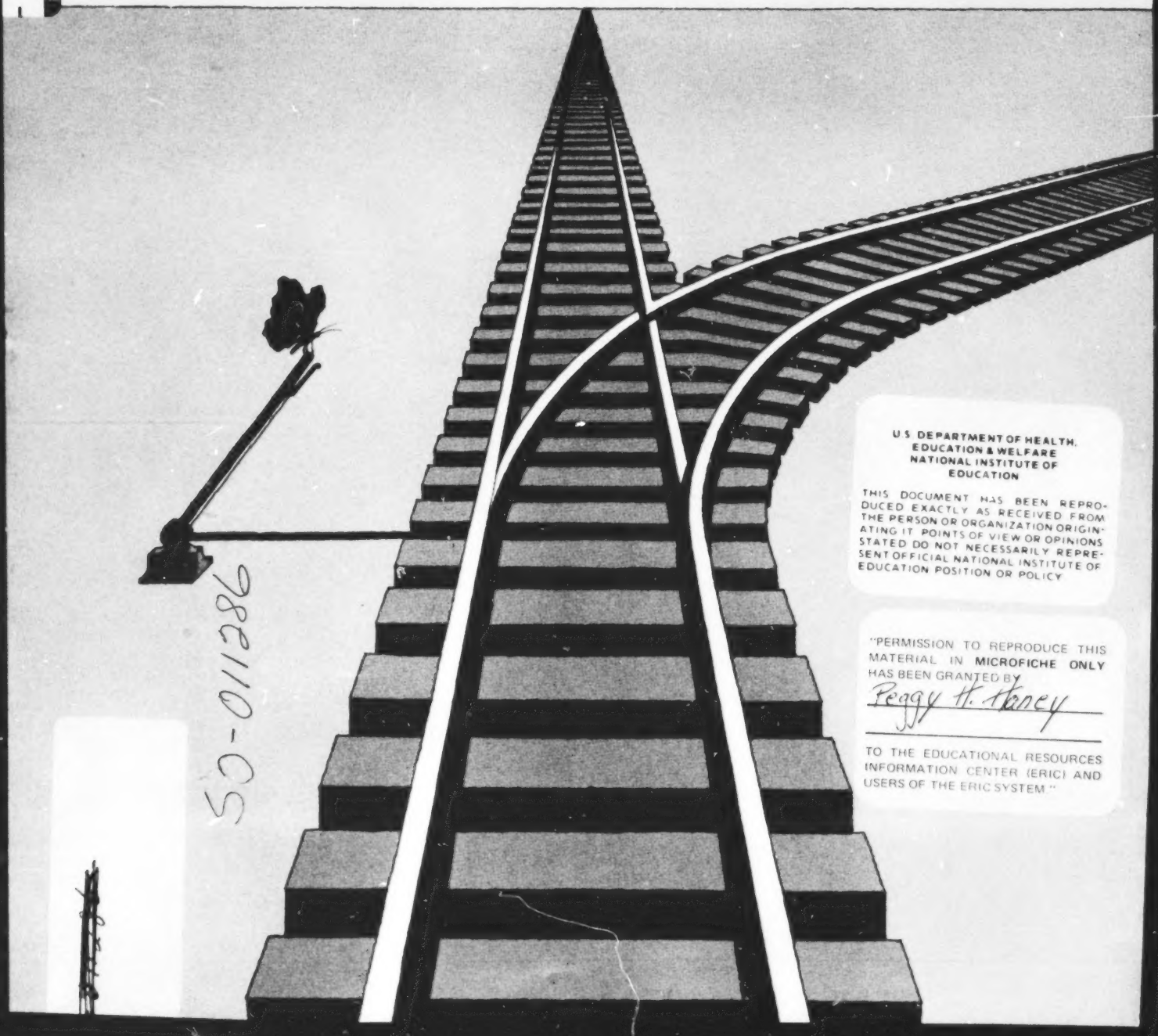
Managing Change



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Peggy H. Haney

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC) AND USERS OF THE ERIC SYSTEM."

SO-011286

Editorial Page

Many people function as change agents—consumer educators, consumer affairs professionals, business managers and community leaders, to name a few. The role is not an easy one. Change can be uncomfortable—the process of change involves stress and conflict. In order to implement the needed transition from what *is* to what *might* or *can* be, the change agent needs insight and knowledge about the process of change itself.

This issue of FORUM was developed to bring together as much information as we could on the nature of change to help those involved in change efforts be more effective in their roles.

Our major resource for this issue was Howard Lim, a psychologist in the Human Resources Department of our Company. Howard is a fascinating person as well as a good teacher, and we enjoyed working with him. He developed the activity on page two as a self study. You may wish to begin there to discover your own attitudes about change.

As we talked with potential authors suggested by Howard and others and tried out some of their suggestions, we gained valuable insight about the role and function of the change agent. We discovered a key principle: The strength of the advocate's position tends to provoke resistance of equal or greater intensity. Does this mean an advocate cannot be a change agent? Yes *and* no.

An advocate without an understanding of the nature of change and some skill in guiding change will tend to elicit defensive, counter-productive conflict. We could all recall such occasions. Conversely, the advocate who can also facilitate change tends to guide progress toward a creative solution that generates the willing commitment of all those who choose to get involved.

A change agent, by definition, cannot manipulate or force change even subtly by a simple presentation of the "facts" of the matter. Instead, he or she can develop strategies for establishing an atmosphere where all can participate in bringing about change together.

As we more clearly understood the role and function of the change agent, we saw effective educators as both advocates and change agents. After all, growth involves stress and conflict.

Howard and I were photographed during an initial planning session for this issue of FORUM. The view from our new Broadway offices can be seen in the background.

New Consumer Information Guides

As you look through the new *Fact Sheet* enclosed with this issue, you will see a greatly expanded offering of Consumer Information Guides. Developed under the direction of Hazel Schoenberg, Manager of Consumer Information in our Consumer Affairs Department, these guides have been planned to help consumers make buying decisions that are best for their individual situations.

Making Effective Use of Group Process

Last spring we produced a short filmstrip and cassette, *Human Energy: How to Move a Mountain.* You may have seen it in the materials lending library of your local Penney store. Many tell us they have found it a flexible approach for helping people understand how their behavior affects problem solving. You might find it useful in settings where you are trying to help people communicate, wearing your change agent "hat." It is done in cartoon form and is a parable about group process.

See "Human Energy: Releasing Human Potential" by John D. Ingalls, an article in the Spring/Summer 1978 issue of FORUM, for another interesting viewpoint on change and the change process.

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Looking for Me: Understanding Consumer Behavior in the Marketplace is our latest multi-media teaching unit. Responding to your requests for junior high school level materials, self-concept and basic human needs are highlighted. The activities help students use their own experience as data for understanding their feelings and behavior. This kind of activity can be used with older teenagers and adults as well.

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Resources of Interest

As we develop publications, we rely on a wide variety of written materials to stimulate ideas. Two we have found useful are:

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About the Cover

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Cover Illustration by Guy Billout

How do you feel about change?

Mark an X closest to the side of each continuum, or at a point somewhere in between, which best represents your response to the following:

When I'm trying to change or influence how others think or act, I tend to be very

controlling: by advocating strong persuasive arguments

considerate: by diplomatically showing how our viewpoints differ

When people try to influence my thinking, I tend to react by

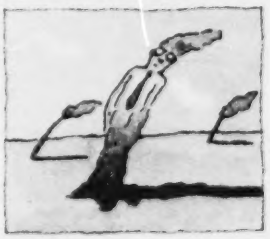
immediately revealing the fallacies of their arguments and holding fast to my beliefs

open-mindedly examining the validity of their views and even accepting some of what they say

In my own commitment to growth and development, I tend to believe that it is best to

set ambitious personal goals and then work hard to achieve them

remain flexible to see how conditions shift and direct my life



Conflict in the form of arguments, debates and tensions serves mainly to

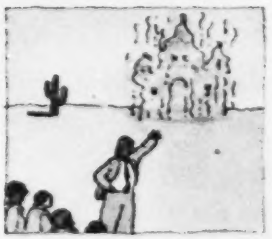
impede harmony and progress

stimulate thinking about innovations and change

The amount of social support which I need before I take action is

minimal: I prefer to be independent and even outside the group

high: I prefer to be with my peers and advance with them as a group



The best way for social change and progress to occur is through a

charismatic leader who dramatically points people toward a new ideal

slow process of discussion and participation involving all those people who have something to contribute

A predominance of X's on the left side may indicate a degree of resistance to change, while a greater openness to change may be indicated by X's on the right side of the continua.

Who's Responsible for Change?

by Howard Lim

Have you ever thought that people are too conservative, cynical, idealistic, materialistic, short-sighted, selfish, lazy, thoughtless or manipulative? We are probably most acutely aware of these thoughts at those times when we are trying to influence someone's thinking. Whether as educators, salespeople, managers, lobbyists, politicians, therapists, consultants or lawyers, we are all expected to have an impact or to change the way people think and behave.

On the other side, our feelings can range from boredom to anger when we are subjected to these same influencing attempts by others. Whenever we're confronted with someone who wants to sell us an idea, we commonly hear ourselves saying:

"Yes...but...."

"Our situation is quite unique..."

"We need to be sure that..."

"I admire your ideals, but..."

However, none of us should feel that personal resistance to change is the only barrier to progress and innovation. Each of us carefully protects our own sense of identity and autonomy in our social interactions. Such reactions are analogous to the manner in which societies orient themselves toward change. In fact, one way to understand social change is in terms of its opposite-stability. Stability is a human and cultural necessity. We see its influence in our commitment to our own personal habits. We demand justification from those who want to change our accepted practices and programs.

Our self-image, both at the personal and cultural levels, demands a strong continuity. We tend to think of ourselves as living with the same personalities, values, needs and friends over long periods of time. We can project ourselves into the future and estimate quite accurately the kinds of changes which will concern us. We know there will be differences of age, of location and of income, but the continuity dominates, and we like it that way.

Yet we know that the search for too much stability causes us to become rigid and inflexible. The problem for us all is how to live with a comfortable balance of stability and change, tradition and innovation. Balancing these opposing forces is as much a social and organizational problem as it is a personal and individual one, whether we are looking at a large "unit" like a nation or community *or* a small unit like a working group or person. Stability and change must be viewed as complementary rather than opposing forces. Both are essential in balancing progress.

Every society can be characterized by the particular manner in which the forces of stability and change are balanced. Some societies have even tried to institutionalize change in order to achieve a society in perpetual revolution. Still other societies have opted for stability. Similarly, companies and other organized groups have been affected by attempts at balancing the forces of stability and change.

As our world becomes increasingly interdependent, each of us bears a share of *responsibility for change.* This can be a job responsibility in some cases, while for others it is a responsibility inherent in some social role as parent, community worker or citizen. Without *active responsibility* and involvemert in change, society could not function. There would be a split between those who possess the self-righteousness of their ideals and those who would resist attempts at manipulation and coercion.

Planned Change

Many of us have jobs which explicitly commit us to work toward some change goal: a better educated consumer, a more responsible corporation, a more efficient government. The people we work with are quickly aware of the pressure to change. Whenever we work to promote change, the natural resistance to new suggestions can escalate to the point where we are seen as manipulative or insensitive to the needs of others.

The dilemma we all face is that we are simultaneously creating and responding to change.

As we attempt to influence and change others, we need to recognize that they may also want to influence us. We perhaps unintentionally reject people who won't let us influence them, who remain unmoved in spite of our most brilliant efforts. Unfortunately, they usually respond by closing themselves even more. We then face a stand-off in which no one can influence anyone else. Obviously our schools, organizations and society would stagnate.

Because our involvement with change is inevitable, each of us needs to come to a personal position on *how* to react to change and *whether* to initiate change. We need to ask ourselves:

Do I react to change in a positive manner which permits progress and experimentation?

Do I relate to others in a manner which permits mutual feedback?

We need each other, because by ourselves—regardless of our formal rank—we can accomplish little. Our mutual responsiveness is, in and of itself, a unifying force.

In short, are we aware of our human interdependence?

Changing Others

When I am advocating change, I am most likely to take the following approach (check one):

1. I assume that people are essentially rational and will therefore respond to my clear presentation of facts and the common sense of the approach I am advocating.
2. I assume that people change only when sufficient power is applied from the appropriate authority.
3. I assume that personal change involves some readjustment of attitudes, values and behavior, which tends to occur in a climate of openness and trust when accompanied by personal and social support.

If you plan to initiate change by using approaches one or two, you are most likely to produce resistance rather than change, since there is a risk that your attempts may be seen as manipulative or coercive.

In working toward some planned change, the third approach is probably the most useful. Taking the most positive view of humanity demands that we pay respect to the whole individual. It limits our use of coercion and does not underestimate the difficulty with which behavior is changed.

Howard Lim is Human Resources Planning Manager in the Corporate Personnel Department at JCPenney. Prior to this he was with the General Foods Corporation where he was active in organization development, management development and market research.

The Management of Agreement or

How to Cope with the Abilene Paradox

by Jerry B. Harvey

Some time ago, my wife, her parents and I spent a miserydridden Sunday afternoon driving fifty-three miles through a raging dust storm across a lonely desert in an un-airconditioned car to eat a greasy-spoon meal in a hole-in-the-wall cafeteria in Abilene, Texas.[1]

During the subsequent family fight in which each blamed the others for the disaster, we discovered that none of us had wanted to go in the first place. Each had incorrectly believed that everyone else had wanted to go, however. Likewise, we had been unwilling to confront one another with the reservations we had about taking the trip, because (ironically enough) we wanted to "keep peace in the family." Paradoxically, the four of us agreed that we didn't want to go and then had proceeded to do just the opposite.

Once things cooled off enough to piece together what had happened, I gave a name to such "insanity." I call it the Abilene Paradox and describe it as follows:

Organizations frequently take actions in contradiction to the desires of many of their members defeating the very purposes the organizations are designed to achieve.

I have also suggested the "Coleman Corollary"[2] to the Paradox. Stated succinctly, the Corollary says that the inability to cope with agreement, and not the inability to cope with conflict, is a major source of dysfunction in organizations.

For example, since that fateful day in Texas, I have become aware that many organizations take trips to Abilene, including:

1. Couples who get married despite their agreement (voiced in confidence to close friends just prior to the ceremony) that they want to stay single.[3]
2. Couples who get divorced despite their agreement (generally voiced in confidence to their lawyers just prior to their final appearance in court) that they want to stay married after all.[4]
3. School systems that have implemented educational programs which administrators, teachers, parents and students agree (generally in private, confidential meetings) are educationally unsound.
4. Businesses which continue to fund projects when management, staff and consultants instinctively feel (in quiet moments alone) that the plan is not working.
5. Legislative bodies who draft revisions onto revisions in order to pacify special interest groups (when privately all involved realize that the revised version may not please anyone in the end).

What are some basic implications of the underlying Paradox?

First, it means there is a difference between *real* conflict and *phony* conflict. Real conflict involves real substantive differences. ("I want to go to Abilene." "I don't.") Phony conflict consists of the blaming behavior (e.g., the family fight) which occurs after agreement has been mismanaged. Knowing how to differentiate the two is important in the same way that it is important to know whether a headache is caused by a brain tumor or stress. (The treatment for the two ailments is very different.)

Second, it means that being in agreement can cause as many problems as being in disagreement. As long as we can say, "We are in conflict. Let's send the plan back for further study," no one has to take the risk of doing anything about solving the problem.

Third, it means that people in all kinds of organizations can be more effective if they learn the skills of agreement management as well as those necessary to cope with conflict.

What causes us to take such journeys?

Basically, trips to Abilene stem from three related causes:

Dr. Jerry B. Harvey is Professor of Management Science at The George Washington University. He has been a consultant to a wide variety of industrial, governmental, service and religious organizations and has written a number of articles in the field of management and organizational development.

[1] See, Harvey, J. "The Abilene Paradox: The Management of Agreement." *Organizational Dynamics.* Summer, 1974, for a complete description of the event.

[2] Named after the small West Texas town that was the starting point of the trip. If you saw *The Last Picture Show,* you saw Coleman.

[3] Paradoxes make strange bedfellows.

[4] And bedfellows make strange paradoxes.

How do you know when you're on a trip to Abilene?

For most of us, trips to Abilene aren't much fun. How, then, do we know when we are on the road, or when we have crossed the city limits or when we are having a final meal in the cafeteria? On the basis of working with a lot of organizations who have taken the journey, I've discovered a number of symptoms of being on the road.

You might like to see if these symptoms apply to you in a conflict situation you are having. Think of a conflict you are involved in at home, at work or at school. Check your responses to the following statements.

1. **You frequently feel angry, frustrated, unhappy, impotent and sterile when dealing with it.** **Yes** **No**

2. **You know what actions *you* would like to take to solve the conflict or problem.** **Yes** **No**

3. **When it comes time to take such action you tend to "put it off," "chicken out" or delay it.** **Yes** **No**

4. **Most of the time you tend to put off action out of fear of hurting others' feelings or of making them mad at you.** **Yes** **No**

5. **You tend to hold candid, open, straightforward discussions about the problem with people who are not party to it, but "waffle" in the presence of those who are.** **Yes** **No**

6. **You frequently find you are looking for ways to "escape" from the tensions generated by the problem. For example, you may avoid meetings, take unneeded sick leave or vacation or look for more satisfying organizational affiliation elsewhere.** **Yes** **No**

7. **You frequently place the blame for the problem on others—other individuals, other groups or the like.** **Yes** **No**

8. **You frequently carry on "fantasy" conversations with persons key to the problem and find yourself wishing you had the nerve to "say things to them which really need to be said."** **Yes** **No**

9. **You notice that other persons in the organization tend to talk about the problem one way in private and other ways in public.** **Yes** **No**

10. **The problem seems to be getting more complex the longer it remains unsolved.** **Yes** **No**

If the number of "yes" responses ranges from three to six items, you are in the car. You have crossed the city limits of Abilene when you have seven or eight "yes" responses. If you have nine or ten circled in the "yes" column, you are probably having a final meal in the cafeteria. More precisely, what you have viewed as conflict is probably a mismanaged agreement.

1. Our very real fear of being separated from others. All of us fear being ostrasized or rejected. And with good reason. Lynch *(The Broken Heart: The Medical Consequences of Loneliness,* Basic Books, New York, 1977), for example, points out that the loneliness of rejection can kill. The broken heart is not a figment of imagination generated by romantic poets for literary convenience.
2. A fear of taking any risks which may lead to ostracism, separation and rejection. For example, when a marriage is in trouble, spouses frequently are afraid to confront one another with the problems each is experiencing, because such a confrontation may lead to a fight and that the fight may lead to the feared divorce.
3. A failure to realize that the failure to take the risk of confrontation increases the probability of unwanted separation and rejection. Thus, the failure to risk talking about problems in a marriage increases the probability of the very divorce which the parties fear.

How can you turn around if you find yourself on the road to Abilene?

I have found that two skills are necessary to manage agreement in organizations.

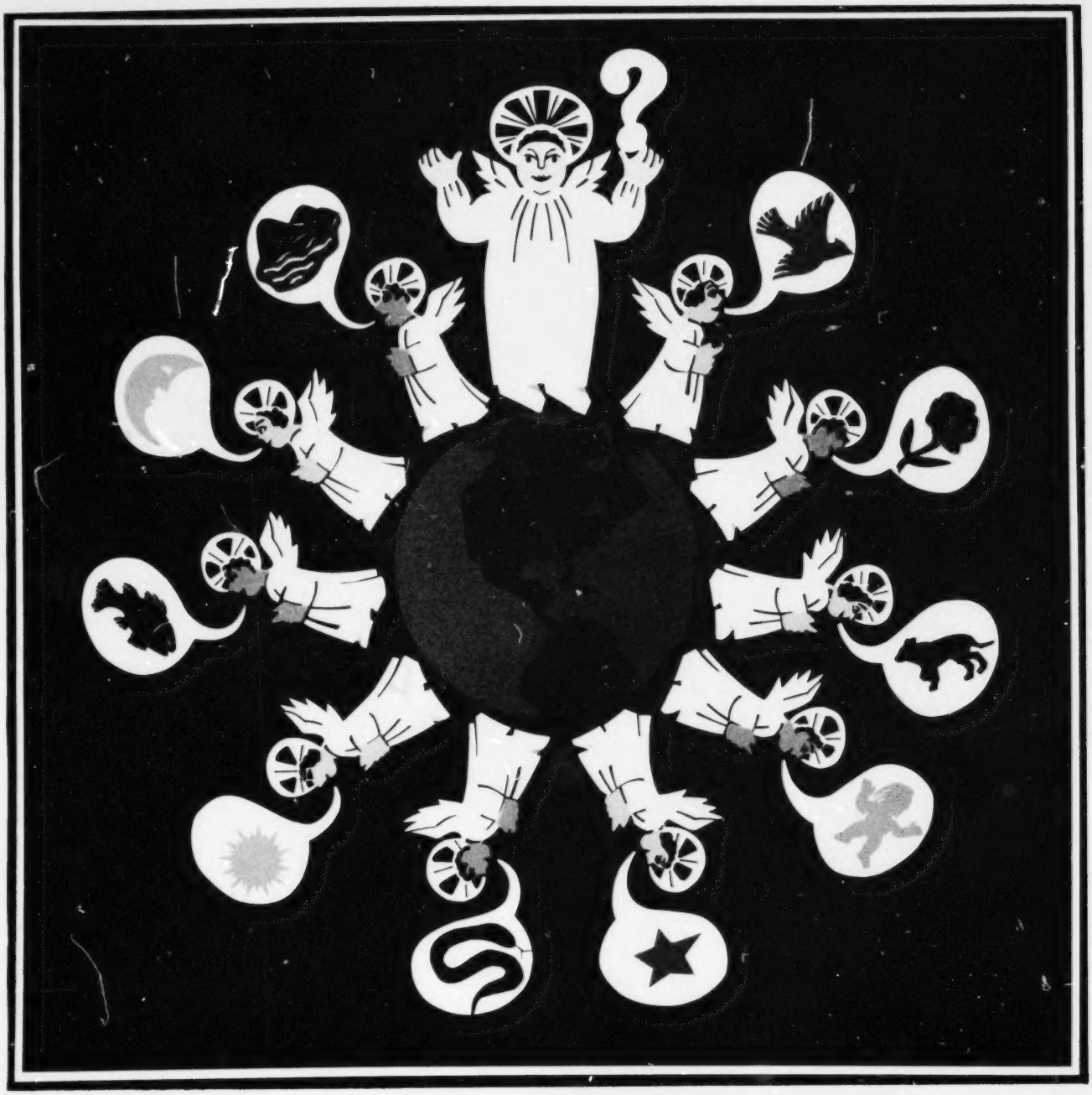
One is called "owning up."[1] It can be learned and consists of learning to make first person statements beginning with the word "I" (I think..., I feel..., I believe...)

- which clearly reveal one's own beliefs and feelings;
- which do not attribute a belief or feeling to others; and
- which are minimally evaluative of any beliefs or feelings others may have.

The second skill is called "risk taking." It means accepting the risk of disagreement and rejection ("I love you." "I don't love you.") in order to discover the possibility of agreement and connection.

Philosophers have dealt rather dramatically with risk taking when they have said, "If you can't risk dying, you can't experience living." I would put it less dramatically, "If you can't risk the real conflict, you can't enjoy genuine agreement." Or, in even more prosaic terms, if you can't take the risk of saying, "I don't want to go to Abilene," you have to take the trip—either to there or somewhere else—which may be far worse.

[1] See, Argyris, C. *Intervention Theory and Method: A Behavioral Science View.* Addison Wesley, Reading, Mass., 1970, for a discussion of the concept upon which this version is based.



Strategies for Helping People Change

by Eugene R. Watson

"What can we suggest that doesn't require a background in group dynamics to help people bring about change?" This was the topic of our early discussions with Dr. Watson. His description of food habits research familiar to many with a home economics background provided a starting point for this article.

In the early stages of World War II, social psychologist Kurt Lewin directed a series of community-based research studies which have profoundly affected planned change practices. The goal of those studies was to find more effective means of bringing about certain changes in American food habits in support of the war effort. In the most widely-known of those studies, some community peer groups were exposed to lectures and printed materials developed by experts. Other groups took part in discussions in which knowledgeable persons provided information and facilitated discussions. In both situations, the objective, the behavioral change desired was to encourage the participants to serve sweetbreads, heart, and liver as well as other nutritious and available, but low appeal, protein items. Months after those activities, a follow-up study indicated that only 3% of

Jacqueline Chwast

the lecture group participants, as contrasted with 32% of the discussion group participants had changed their behavior.

Lewin's pioneering work has been borne out repeatedly since that time, clearly establishing the high potential of peer group discussion for generating a climate which fosters informed decisions, commitment to action, and productive management of controversy and conflict. It appears almost inevitable that significant change efforts will generate controversy and often conflict. In response to this, change agents must devote continuing attention to the change process itself. This does not prevent their being advocates for any particular change, but it does require that they learn the skills of facilitating change in addition. The change agent may provide initial basic information about a possible change, as well as additional information or references upon request by the group. No commitment to change is likely to occur, however, until the information is considered from the vantage points of the group members. In that way, the decision becomes their own and commitments made in the presence of peers become more binding.

In the past decade, research and practice have indicated that higher levels of learning take place in group-centered discussion where and when there is an appropriate structure for pursuing the task or topic. Unfortunately, many who attempt to lead change have not adequately followed established principles of decision making in groups, assuming that extensive skill in group work is required. Many have chosen to follow a strong advocacy approach in which they become the central figure attempting to sway other group members instead. There are a variety of structured group approaches now available which are group-centered and enable the change agent to be a participant in the group instead of the central figure. These approaches do not require extensive skill, since they provide a structure that focuses on group efforts from the outset.

Group Centered Strategies

There are three approaches which are particularly helpful in exploring controversy while reducing the potential for conflict. All of them greatly increase the amount of information and range of alternative interpretations early in group interaction. Thus members feel more responsibility for group effectiveness and are more likely to assume collaborative and supportive postures. These approaches are:

1. force field analysis—for establishing, at the outset of a discussion, an agenda or outline of relevant positive and negative forces in a possible change situation;
2. nominal group process—for development of a broad range of possible solutions, responses or viewpoints in regard to barriers to change; and
3. a community collaboration exercise—for bringing a number of groups together to share varied stances and to pursue a final con-

1. Force Field Analysis

Procedure

1. Introduce the basic process described in numbers 2 through 6 below. If possible, practice on an unrelated proposed change goal. State both the proposed solution and the issue or problem situation to which it relates.
2. Draw this diagram on newsprint or a chalkboard:

Issue: Consumer Education

Proposed Change or Solution:	**Establishment of an interdisciplinary Consumer Education Department**
Forces for ——→ (the proposed change or solution)	**←—— Forces against (the proposed change or solution)**
(list of forces)	**(list of forces)**
ex: more effective use of educational resources (teachers)	**ex: "territorial" disputes**
increased effectiveness	**differences of philosophy**

3. Explain the diagram and ask each group to list on a chalkboard or newsprint the forces which go in either column. You might explain the "against forces" as those which hamper the proposed change, and the "forces for" as those which would strengthen the proposal. Discussion of the lists should be withheld until all anticipated forces are listed. Allow about 10-15 minutes.
4. Ask each group to discuss its own list. Have them determine which "forces for" can be strengthened and which "forces against" can be decreased. Circle those forces which seem to be the most important, particularly those which the groups think can be researched and discussed in more depth. Allow 20 minutes or more for this discussion.
5. In each group ask one or two group members to research each important force (by seeking material and human resources) and to bring findings back to the next group session to share with the group.
6. For each important "force against," ask the groups to list and document possible responses or action steps (behaviors) which might reduce the effect of the force or eliminate it completely.* The groups should have a chance later to describe which are the most appropriate. List and evaluate as many responses or action steps as possible which would increase the effect of each "force for." Allow 30–45 minutes for this.

2. Nominal Group Problem Solving

Procedure

1. Introduce the basic procedure described in numbers 2 through 5 below. If possible, practice on a sample problem.
2. Ask members of each group to work *individually* on an issue or problem that lends itself to creative thinking. It should be a very specific issue or problem for which no response or solution is available currently, but for which one or more might be found. As indicated previously, the problem may be to find a means for reducing or eliminating a force against the proposed change. Members are given about 10 minutes to "free wheel" and fantasize, recording their two best ideas on paper but not putting their names on the paper. There should be no talking.
   Using the consumer education program as an example, each group might be asked to do the following: "Each person should list two ideas for a consumer education program other than through establishing an interdisciplinary consumer education department."
3. Members then form circles with their groups, and their lists of ideas are randomly distributed within their groups.
4. Each member reads the ideas of another member. Care is taken not to attempt to identify the writer unless to clarify an item. No evaluation is allowed until all ideas have been read and recorded on a chalkboard or newsprint, for all members to consider. Additional items may be called out at that time by group members.
5. Extensive discussion and initial evaluation of their ideas by each group, for about 30 minutes or more, is followed by a consensus decision on one or more of the ideas for testing. In order to reach *consensus* (the majority clearly favors, and the minority indicates that they can support the outcome), the following guidelines should be given to each group:
   (a) avoid arguing solely to protect your own judgments;
   (b) avoid changing your position merely to "keep peace" and support only those ideas with which you agree;
   (c) avoid using majority vote, or trading off part of your stance to win on another part of it, without adequate discussion; and
   (d) try to value differences in ideas and opinions.

*Nominal group problem solving may be used very effectively at this point.

(This strategy is adapted from the work of André Delbecq and Andrew Van de Ven.)

sensus outcome that all the groups can support. Integral to this exercise is the opportunity for all parties to have a voice.

Since these approaches stimulate problem-solving, decision-making and action-planning behaviors in groups, they can be equally effective for classroom learning or for group work in organizations and communities. They can be used independently or in sequence. For example:

A group of educators, administrators and community leaders are studying possible changes in a consumer education program. They might thoroughly examine forces for and against (force field analysis) the proposed establishment of a new interdisciplinary consumer education department in a local high school. Then each interest group might be asked to think creatively about the forces as individuals and decide as a group upon ideas (nominal group process) for reducing the "against" forces while maintaining or strengthening the "for" forces. They might then develop plans for an alternative to the proposed change. Finally, each group might have its plan presented to the total community of interest groups and then join in seeking a consensus on the one best plan for the total community (community collaboration exercise).

Essentially the same process might be followed by organizational or community groups as they consider changes such as, zoning regulations, the introduction of new product lines or the reorganization of lines of authority in reporting relationships.

Crucial Group Factors

The change agent's role in group-centered discussion is that of helping the group identify the proposed change (if one is needed) and suggesting appropriate techniques or structures for pursuing their task. There are, however, a number of important group factors that must be considered by the change agent.

Size

While it is possible to conduct limited discussions with very small (3–4 persons) or large (15–18 persons) groups, both extremes pose barriers to comprehensive involvement, committing discussion and decision making. Discussion in very small groups tends to demand too much of each participant in terms of the information made available, personal need satisfaction of other members and maintenance work for the group. As a consequence, discussions focused on controversy tend to accrue excessive tension and further reinforce strongly held stances and defensiveness in such groups. Discussion in large groups tends to be increasingly non-involving as individuals perceive that they cannot get adequate "air time" to present their viewpoints and respond to challenges. They also find it very difficult to evaluate and integrate the excessive amount of information flowing from the various human resources in the groups. Often members trying to offer certain information or suggestions in large groups find that someone else does so first consistently. This leads them to become psychological "dropouts," as does the scarcity of "air time."

Groups of six to ten members, preferably eight, are more likely to be involving and effective.

Composition

The change agent often has little or no control over composition of groups. There is, however, overwhelming evidence that richer and more stimulating discussions occur in groups that are moderately heterogeneous in their stances on controversial issues than in those that seem to be highly homogeneous. Homogeneous groups tend to have narrowly focused discussions in which there is limited challenge and inadequate probing of various stances.

Given any voice in composing groups from a fixed number of participants, the change agent should strive to achieve a balanced heterogeneity in each group.

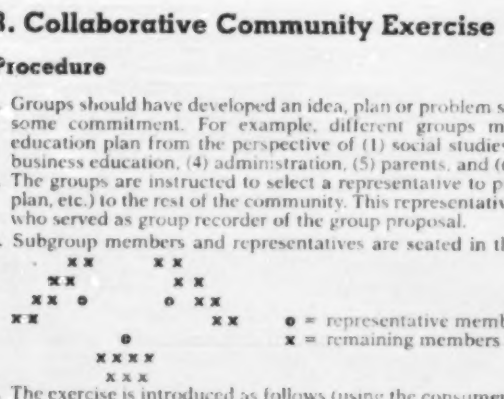
Time and Frequency

Again, decisions about time and frequency of meetings often cannot be influenced by the change agent. Yet the change agent should caution each group that unless adequate time is made available in one meeting, or over several meetings, members will be quite dissatisfied with their progress. Because of the time required for preliminary personal need meeting, group "housekeeping" and the time used in closing a group session, two-and-a-half to three hours is usually a minimal amount of time to discuss any controversial issue. If sessions are to be continued and momentum maintained, recall of past information, awareness of progress and degree of member commitment all suffer substantially if the period between sessions is even one week.

3. Collaborative Community Exercise

Procedure

1. Groups should have developed an idea, plan or problem solution to which they have some commitment. For example, different groups might present a consumer education plan from the perspective of (1) social studies, (2) home economics, (3) business education, (4) administration, (5) parents, and (6) students, etc.
2. The groups are instructed to select a representative to present their solution (idea, plan, etc.) to the rest of the community. This representative should not be the person who served as group recorder of the group proposal.
3. Subgroup members and representatives are seated in the following arrangement:



4. The exercise is introduced as follows (using the consumer education program as the issue or problem): "This is a collaborative community exercise. The representatives have the task of deciding upon the one best plan (solution) for the total community, in order to implement an effective consumer education program.

   Each representative will have no more than 5 minutes to present a spoken summary of his or her respective group's plan for a consumer education program in the community. Until all are presented, there will be no discussion of them."

5. After each of the solutions has been presented, the representatives, with the help of their group's members, will have 30 minutes to discuss the alternatives. Compromise and combination are appropriate and desirable.

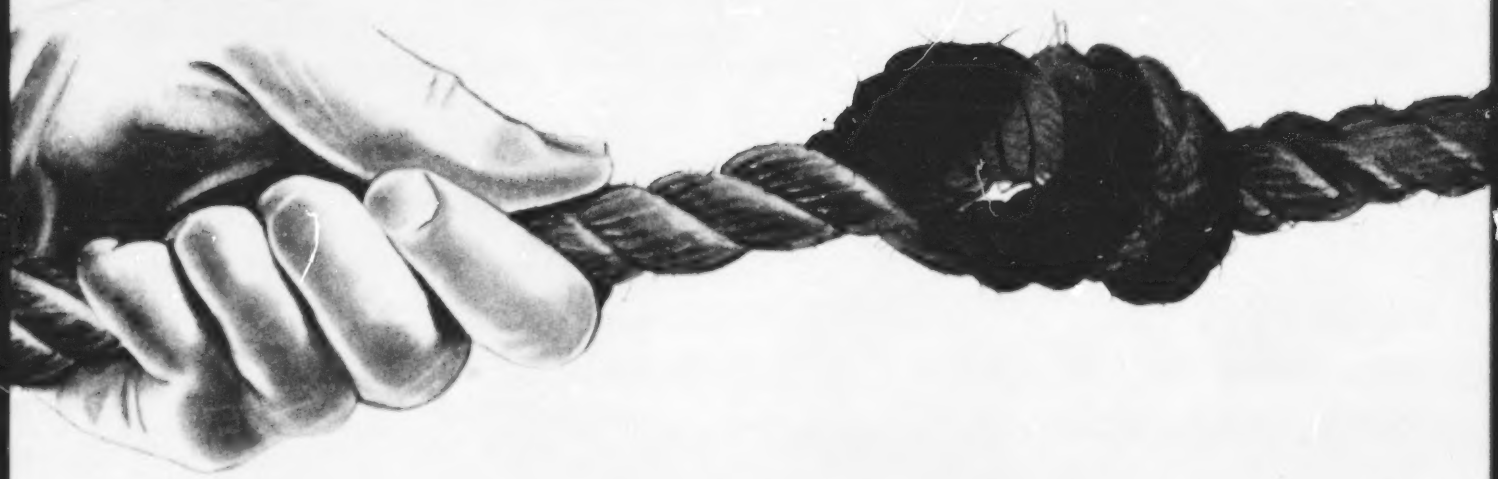
   Only the representatives may openly discuss the solutions and state the final outcome. To facilitate this process, either the representative or the group members may stop the discussion by calling "communicate," which will send the representative back to his/her group for 30 seconds to receive additional information, suggestions or corrections. When such a break is called, all communication between representatives ceases for the full 30 seconds. The other representatives may use this time to confer with their groups if they or their groups so desire. A break may be extended for an additional 30 seconds by a second call of "communicate." The process may be repeated by any representative or group after discussion has resumed among the representatives. There is no limit on the number of times it may be repeated until consensus is reached by the representatives. Allow 30–45 minutes.
6. A review of the process should focus on the methods used in reaching a community decision. Included should be an analysis of the tendency towards a "win/lose" battle among the groups before movement toward true compromise and collaboration. Difficulties in representing a "back-home" group should be examined.

(This strategy is adapted from an exercise developed for the National Training Laboratories Institute for Applied Behavioral Science.)

Dr. Eugene R. Watson, an Associate Professor of Higher and Adult Education at the University of North Carolina, presently serves as Acting Director for the Governor's Program for State Executive and Organizational Development. A consultant in leadership and human relations training, he has also written widely in the field of adult and continuing education.

Converting Controversy into Creative Change

by Malcolm Knowles



We met with Dr. and Mrs. Knowles during a rare North Carolina snow storm to learn more about self-directed learning, an area in which he has written extensively. Our discussion led us to see how the resolution of conflict is really a problem-solving opportunity. This article is a result of that discussion.

The existence of controversy is a sign that people care about something. When people care about something they are willing to devote energy to it. Typically, when people disagree, the energy this generates produces an emotionally tense, combative atmosphere. Sides square off and battle to convince the others of the logic and desirability of their argument. Or, the less forceful side gives in. But there is another way to deal with controversy than a win/lose approach, and that is a creative process of problem solving.

A leading authority in the field of adult education, Dr. Malcolm S. Knowles is presently Distinguished Professor, Adult and Community College Education at North Carolina State University. He is best known as the author of The Modern Practice of Adult Education *and for his methods and practice in self-directed learning.*

Making controversy creative means converting forces that oppose each other into forces which are focused on solving the problem. This process requires a leader (or change agent) who is able to convert conflict into a creative climate in which everyone wants to achieve the following conditions:

1. A Positive Attitude

Controversy is a part of life. It is inherent in human society if we define controversy as disagreements among people. One of the most fundamental characteristics of human society is individual differences; the democratic concept places an especially high value on pluralism. Democracy assumes that people are different and seeks to establish procedures that will draw strength and richness from these differences. If controversy is so inevitable, why then is it so disturbing to us? Perhaps it is because we have not yet learned to see value in the creative handling of controversies and disagreements. We may not see that emotional involvement enables us to engage more energy for exploring alternative approaches and for being more creative. Yet, too much emotion can be destructive; that's why we need a process for dealing with controversy effectively.

Cathy Hull

2. Understanding Underlying Causes

It is an interesting phenomenon that the most heated controversies are often over little things, carried on at a superficial level. Some of the common causes of controversy are:

Psychological needs or "hidden agendas" of individuals or groups.

1. For example, all people need to feel a minimal degree of security. In a situation that is too ambiguous, in which the goals and "rules of the game" are too unclear, and in which the atmosphere is charged with too much hostility, we tend to become defensive and withdraw from the fray. Often, we tend to lash out at others. The cliche, "The best defense is a good offense," comes to mind.
2. All people need to feel respected, esteemed and recognized as having worth. When we feel others are not listening or taking our ideas seriously, we often feel pushed to take extreme positions as a means of gaining group attention.
3. All people have a need to belong, to be accepted into full membership in a group and to be liked. When people feel that they are being excluded from important decisions or activities, they may be tempted to try to find other rejectees and form a disruptive faction.
4. All people have a need, too, to express their unique personalities, to find self-fulfillment in what they do. When we feel that pressures to conform to some alien model of behavior are too strong, we may rebel by irrationally opposing everything the group wishes to do.

Semantic differences. Controversies of the most heated kinds can arise from the simplest differences in understanding of the meaning of words. Such words as *consumerism, free enterprise, law and order,* and *equality* have noble connotations to some and negative connotations to others. Only when these differences in meaning are brought into the open and common meanings arrived at can rational discussion proceed.

Differences in information. Frequently the source of conflict can be traced back to a difference in information by the contending parties. This difference may remain unrecognized, with the parties arguing as if they were proceeding from the same facts. In this case, the controversy can be resolved only when the participants become aware that they do not have the same information and take steps to obtain mutually acceptable information. On the other hand, the difference in information may be recognized and the controversy may revolve around which of the two sets of facts is correct. The solution here may be to get more facts, to evaluate the respective sources of information or to obtain the judgments of mutually acceptable outside experts.

Failure to distinguish between matters of fact and matters of opinion. It is generally recognized that everyone has a right to his or her own opinion. Usually, it is not too disturbing or controversial when opposing opinions are expressed, so long as they are recognized as opinions, but whenever either party treats an opinion as if it were a fact, controversy is born. If I say, "It sure is hot," you can say, "That's interesting, I think it's cold," and I won't feel like a fight. But if you react to my opinion as if it were a fact and say, "You're wrong, it's cold," then we have an argument and controversy.

3. Agreement on Ultimate Goals or Values

There may be disagreement about sub-goals without destroying the chance for engaging in creative controversy, but disagreement as to end-goals effectively destroys that chance. For example, if a group cannot agree as to whether they want their community to be residential or industrial, there is no point in their discussing zoning ordinances.

4. Awareness of Possible Solutions

In order to involve everyone and take advantage of creative potentials, insure that the widest range of alternatives is considered and that their consequences are well understood. Some of the traditional solutions to controversies and their consequences are:

- One side having the power to enforce its will on the other. It usually results in the losers being crushed, and the underlying issue smolders on. "They live to fight another day."
- Both sides agreeing to drop or "table" the matter. This is an escape procedure that leaves the problem unsolved, and a potentially creative solution may remain undiscovered.
- Both sides agreeing to refer the matter to someone else for decision. This may be an escape from acceptance of responsibility or a recognition that others need to be included in the decision-making process.
- Both sides agreeing on a scapegoat (the government, big business) on whom they can place (or displace) the blame.
- Both sides making some concessions through negotiation until a compromise is reached. This is a more mature behavior than any of the preceding methods, but it may still not result in a complete and permanent solution to the problem.
- One side using persuasion to convince the others. This solution may work if it is accomplished in an atmosphere of free, open and uncoercive discussion.
- Everybody giving loyalty to the group, rather than to "sides," and focusing attention on solving the real problem by the scientific process of (1) defining the problem, (2) objectively examining all the facts about it, (3) thinking through all the possible solutions, (4) testing the solutions as to their workability and consequences, and (5) agreeing on the solution that best meets the requirements of the situation.

This has been a brief description of the four conditions that are necessary for dealing creatively with controversy. How are these conditions created? My experience as an adult educator leads me to put my faith in using controversy as an opportunity for learning to solve problems more effectively. This requires converting from a combative, win/lose situation (power-coercive strategies) to a problem-solving approach (learning strategies).

The consumer educator involved in change can provide leadership in channeling the energy of conflict into problem solving by following the six steps to creative controversy.

Creative Controversy

Step 1: Create a climate of trust.
Establish a warm, friendly, supportive climate in which people can feel free to express their real feelings and ideas without fear of being hurt or squelched.

Step 2: Mutually plan the meeting.
Involve everyone concerned in the making of decisions and the sharing of responsibilities. Keep responsibility and participation in the group as a whole; don't let it get shunted off into a few vocal or willing members. Be sure all interested parties or sides can participate in planning the agenda.

Step 3: Assess the needs of group members.
As a group, define the problem or issue producing the controversy. Divide it into its various elements or sub-problems and work on these sub-problems one at a time in their logical order. Failure to define or avoidance of the real problem leads to frustration and fragmentation of group energy.

Step 4: Define objectives and set goals.
Agree on ultimate goals and values and relate specific issues to them. In groups larger than a dozen people, this objective can best be accomplished by having sub-groups of four or five work out proposals to be presented to the larger group for negotiation.

Step 5: Design and implement problem-solving strategies.
Be sensitive to *feelings* as well as *ideas*, responding and helping others respond to both with understanding and acceptance.

Distinguish between facts and opinions and, where facts are needed, make use of the best available resources.

Go beneath the surface symptoms of disagreements and deal with the real causes.

Bring in neutral outsiders if an impasse is reached to help find facts and suggest new procedures for discussion.

Step 6: Evaluate the plan and progress.
Consider objectively whether the *way* you are discussing the problem is producing the desired results and change.

How Trusting Are You?

by Jack R. Gibb

Ask yourself whether you lean more toward agreement or disagreement on the statements below. Mark the blank with an A if you tend to agree with the statement or a D if you tend to disagree with it:

_____ 1. It seems to me that most people need a lot of controls to keep them on the right track.

_____ 2. It is easy for me to take risks in my life.

_____ 3. There are large areas of myself that I don't share with other people.

_____ 4. I almost always feel very good about myself as a person.

_____ 5. I often go along with others simply because I feel a sense of obligation to them.

_____ 6. In most life situations, I feel free to do what I want to do.

_____ 7. If I showed my real innermost thoughts to most people, they would be shocked.

_____ 8. I feel that no matter what I might do people generally would accept and understand me.

_____ 9. I feel that I have to keep myself under "wraps" in most life situations.

_____ 10. In an emergency, most people act in caring and effective ways.

_____ 11. It seems to me that most people live in fear.

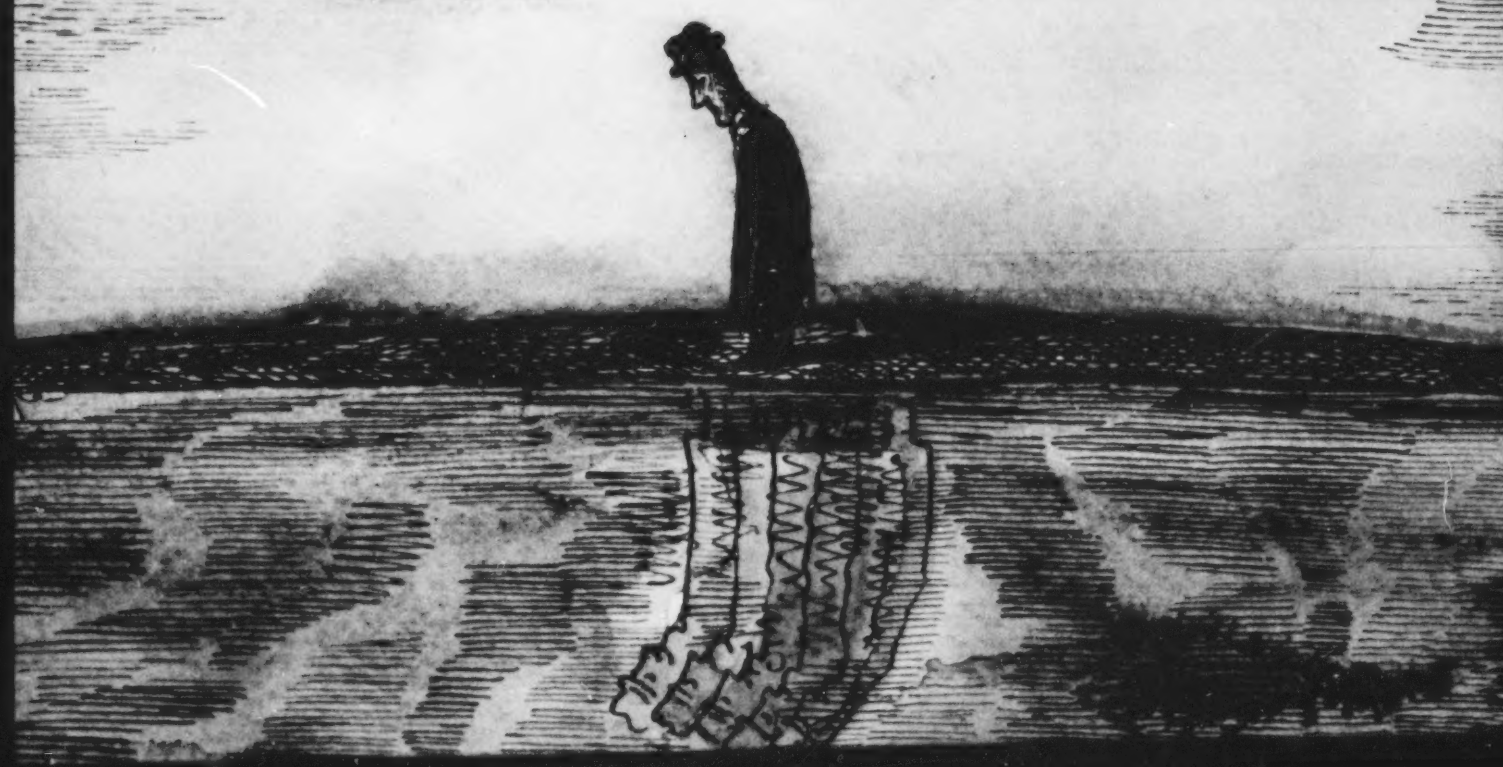
_____ 12. I feel little need to cover up the things I do and keep them from others.

_____ 13. If I did what I really wanted to do in life, I would be doing different things from what I am now doing.

_____ 14. I find that people are usually willing to help me when I want help or ask for it.

_____ 15. My relationships with most people are objective and impersonal and appropriate to our roles.

_____ 16. Most of my friends know my most private and significant feelings and opinions.



TORI

In our initial conversation with Dr. Gibb, he explained that a climate of trust is essential for reducing stress while at the same time nurturing change and growth. While this goal may be difficult to achieve in some situations, he suggests understanding our own trust level as the starting point.

Before you read any further in this article, be sure you take a couple of minutes to complete the brief trust scale on the preceding page. The test is an opportunity to consider how you describe yourself and your attitudes—the way you see and feel about yourself, other people and the world in which you live. Completion of the test may provide you with some helpful personal insight. People who feel highly trusting usually disagree with odd-numbered items on the scale and agree with the even-numbered items. The maximum high-trust score is 16. The maximum low-trust score is zero.

Trust, Fear and Change

The statements in the test are based upon a theory of change called TORI: Trust, Openness, Realization, Interdependence. The theory states that these four factors determine how effective or ineffective you can be as a change agent. They apply whether you are an educator working with other learners, a manager working with other members of an organization or a consumer affairs professional in a community meeting. In short, the effectiveness of any social or organizational system and the benefits to be derived from its change process is determined by these same four factors.

People change. Institutions change. Continuous change is a positive sign of growth. No change is a sign of stagnation. Trust is the catalyst for any human process of change. Fear is the major obstacle. When trust is high relative to fear, persons and social systems function well and change naturally in beneficial ways. When fear is high relative to trust, change efforts break down and change is seen as disruptive or threatening. Resistance to change is often a symptom of lack of trust.

Trust enhances the flow of mental and physical processes. With trust, energy is increased and mobilized; creativity is heightened; people act in more direct and effective ways. Change in such circumstances is welcomed. When *trust* is high enough, persons and institutions transcend apparent limits to discover new and awesome abilities of which they were previously unaware.

Fear is antithetical to trust. When fear levels are high relative to trust, life forces are mobilized in defense against real or imagined dangers. Perceptivity is reduced. Judgments become critical and narrow. Feelings and emotions are disruptive and disabling. Thinking, problem solving and action become unfocused, displaced or dysfunctional. The body and mind processes become segmented and discordant. Energy is drained and creativity disappears.

Change becomes frightening when it is seen as disruptive to normal life—as something that must be avoided or controlled. When fear is high enough, persons and social systems as well as individuals become immobilized or, worse, destructive.

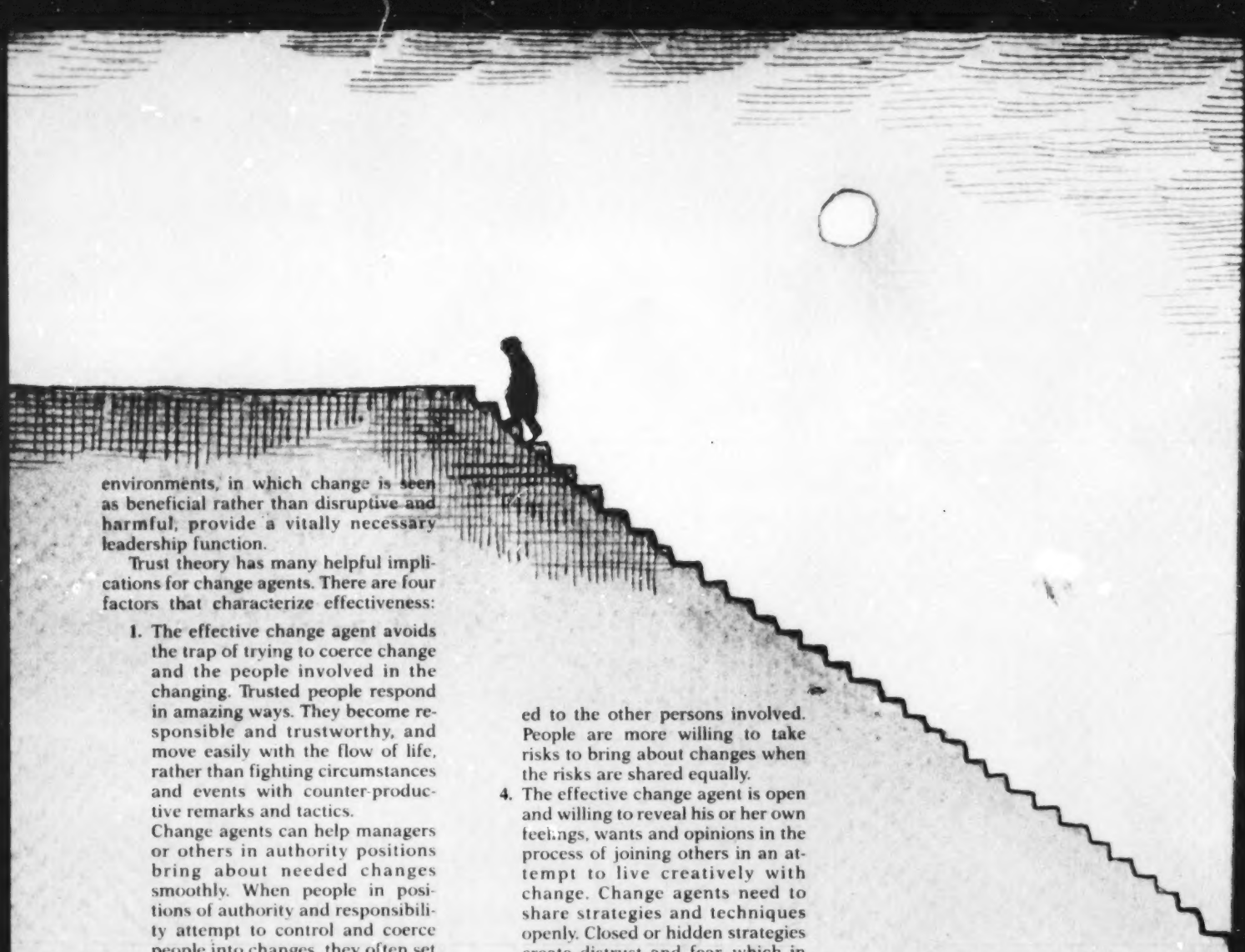
Thus, the level of *trust determines whether change will be beneficial or harmful* and whether or not achieving constructive change is possible.

Participating in the Change Process

Many consumer affairs professionals, teachers and managers are beginning to see themselves as change agents. Those persons who both participate with others and help others participate in creating

	Persons who are in a high-trust state are likely...	**Persons who are in a low-trust state are likely...**
Trust (Indicated by items 4, 8, 11 and 15 on the scale)	to *trust* themselves, be personal with others, have a well-formed sense of being and uniqueness, and feel good about themselves.	to feel distrustful, have a low sense of self.
Openness (Indicated by items 3, 7, 12 and 16)	to live *open* lives, show who they are to others, and express their feelings and attitudes with little pretense or cover-up.	to feel vulnerable and unsafe in life, leave large areas of themselves private and unshared.
Realization (Indicated by items 2, 6, 9 and 13)	to *realize* themselves by fulfilling their own inner wants and needs, taking risks, doing what they really want to do and having a high sense of self-realization.	to believe in the necessity of meeting expectations of others and doing what they are supposed to do.
Interdependence (Indicated by items 1, 5, 10 and 14)	to be *interdependent* with others, enjoy working with, helping, meeting with or being helped by others.	to be competitive, dependent or unable to enjoy working *with* others in an interdependent way.

Currently working as an organizational psychologist and consultant to management, Dr. Jack Gibb is Past President of the Association for Humanistic Psychology and former Director of Research for National Training Laboratories. He has been a university professor for many years and has contributed widely in his field with writings on management, organizational development, group dynamics and human potential.



environments, in which change is seen as beneficial rather than disruptive and harmful, provide a vitally necessary leadership function.

Trust theory has many helpful implications for change agents. There are four factors that characterize effectiveness:

1. The effective change agent avoids the trap of trying to coerce change and the people involved in the changing. Trusted people respond in amazing ways. They become responsible and trustworthy, and move easily with the flow of life, rather than fighting circumstances and events with counter-productive remarks and tactics.
   Change agents can help managers or others in authority positions bring about needed changes smoothly. When people in positions of authority and responsibility attempt to control and coerce people into changes, they often set up resistances which serve to block the achievement of change.
2. The effective change agent avoids the trap of the stereotyped role of manager, advocate or teacher. Impersonal role behavior is a primary cause of distrust. The effective change agent, teacher or manager participates with others *as a person*. The hot-cold, hating-loving, unique person is lost when one assumes appropriate role behavior. When I am a "teacher" dealing with a "student" or an "advocate" dealing with the "opposition," I am no longer being a person being with another person. Getting out of role stereotypes means being yourself. People can trust authenticity and respond with trust.
3. The effective change agent *joins with* others and gets *into the process* of change, participating in the diagnosis, planning, decision-making and resulting actions of the group. This requires courage and trust, which must be communicated to the other persons involved. People are more willing to take risks to bring about changes when the risks are shared equally.
4. The effective change agent is open and willing to reveal his or her own feelings, wants and opinions in the process of joining others in an attempt to live creatively with change. Change agents need to share strategies and techniques openly. Closed or hidden strategies create distrust and fear, which in turn makes people less able to handle changes that are desired or actually occurring. Effective change agents attempt to explore "hidden agendas" and to bring issues, facts and feelings into the open for discussion.

Creating a climate of trust is a matter of optimizing the four TORI factors: to increase the amount of personal, open, self-determining and collaborative behavior in the organization or meeting. Equally important is the reduction of the four parallel distrust-escalating behaviors: being impersonal and in role, closed, persuasive and manipulative, dependent and controlling.

What this means for the consultant, teacher, parent or manager includes at least the following:

1. Being aware of our own behavior, especially as it relates to fear and trust levels.
2. Being aware that we can change our own behavior and trust levels.
3. Consciously creating a social environment in which we can *experience* the way people actually are—that they can be trusted and that we, through our own behavior, help create their trust.
4. Consciously engaging in little experiments with ourselves (within our own trust levels), with being more personal, more open, more allowing, more want-determined and more interdependent in all of our life situations.
5. Realizing that we are the ones who create our own trusts and our own fears, and that we are the ones who can change them. In a deep and very real sense, we create our own lives in this way.

Change is an all-pervasive process which is normal and intrinsic to all effective human action. Trust is a process which gentles our view of change and creates trust in others, making us less dangerous and more enriched and fulfilled. When we are fearful and distrusting, we magnify the danger in the changes that are taking place, trigger defenses in ourselves and in others, and escalate destructive tensions. We also set up self-fulfilling prophecies, because in a significant sense, *fear and distrust usually create the very dangers* we seek to avoid. Trust, on the other hand, provides its own rewards and makes it possible for us to move into the future with full confidence in ourselves and others.

This self-diagnosis trust test is abbreviated from a longer version discussed in the book *TRUST: A New View of Personal and Organizational Development*, by Jack R. Gibb, Guild of Tutors Press, 1978.

Stress and the Agent of Change

by David E. Hartl

Growth is stressful for both the change agent and the others involved. Dr. Hartl has found in his work that recognizing the symptoms of increasing stress can be a valuable tool in managing change. He outlines some basics for us to think about.

Change creates stress. This fact, often overlooked, is of critical importance to the change agent. As we know, too, such stress can produce harmful or painful symptoms. And, all of us have personal limits of stress toleration which, when exceeded, can cause major breakdowns in physical and psychological health. This is what we mean by distress, or more pointedly, by disease.

Most of the changes we experience have been, and continue to be, brought about by external pressures. People are unintentionally pressed beyond their personal limits of toleration because we have not acquired the knowledge of others' capacities for sustaining stress.

When requirements for performance of a task in a timely manner are at stake, those requirements and the economic justifications behind them frequently take precedence over a concern about others' stress. Because most organizations often lack awareness of personal stress limits, many individuals, trying hard to excel in organizations, find themselves experiencing chronic symptoms of distress. This fact is of major significance because it is clear that too much stress is not only physically and psychologically harmful, it is also counter-productive and uneconomical. Still, stress-producing situations continue to be fostered. Many organizational leaders unwittingly subscribe to "carrot and stick" philosophies of motivation without properly understanding the full ramifications of their actions. The skillful change agent or manager operates from a different set of assumptions.

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Internal and External Change

Most change agents view themselves as individuals who intentionally stimulate needed changes. Instead of using externally imposed strategies of the reward/punishment variety, they work to begin internal changes in others. This involves processes and procedures that enable individuals to exercise a healthy degree of autonomy and self-control over the proposed changes. Change strategies must enable others to participate in and influence the change, allowing all to identify and stay within personal limits of stress toleration.

Because change agents induce change intentionally, they must be aware of the varying stress limitations in others. Experienced change agents know how to look for stress symptoms in both verbal and non-verbal behavior. Some of these symptoms, such as strained, rigid or impassive facial expressions, frequent squirming or position changing, withdrawal or non-participation, attacking or defending behaviors or excessive rationalizing are typical examples of increasing feelings of stress.

When stress symptoms become pronounced or reach significant levels of discomfort, try introducing stress-reducing activities. One useful concept is to regard emotion and thinking as equivalent to the hot and cold water taps in your bathtub. If someone is behaving in an overly emotional way because of stress, the change agent turns on more cold water (by making thinking or idea oriented responses or comments) and turns off the hot water tap by avoiding emotional responses altogether. If on the other hand, an individual is engaging in continuous defensive rationalizations, the change agent can "interrupt" the non-productive behavior by using feeling oriented responses, such as "I really am beginning to feel angry and frustrated by your repetitive statements." Or, "I would feel a lot better about you and enjoy you more if you could tell me what you're feeling now (hot tap on) rather than continuing those repetitive thoughts (cold tap off)."

The key ingredient for stress reduction, however, lies in the internalized stress tolerating capacity of the change agent. This fact, also, has significant educational implications. Virtually all internal change efforts involve learning, while externally imposed change calls for adaptation to new roles or regulations.

Change, Stress and Learning

An effective change agent is first and foremost an informal educator. This is not "educator" in the traditional sense of the word. Change agent/educators are rather facilitators of learning; and learning itself involves both change and stress.

Efforts to focus learning objectives on the internal choices of others frequently require great patience from the change agent. Outcomes are not fixed or certain, but must be reached through the processes of interaction and choice. There are many possibilities for taking unproductive detours or wrong turns.

The change agent/educator can skillfully guide others toward constructive activity without imposing or "telling them what to do." Since a supportive environment is necessary for internalized learning to occur, individuals are encouraged and helped to discover for themselves appropriate solutions for dealing with the real or perceived problems in the situation.

A capacity to tolerate the ambiguity of an uncertain and stressful situation is a competency of the effective change agent. Toleration of his or her own internalized stress is essential for a learning environment to be established. By demonstrating the capacity to internalize and deal with stressful situations with some comfort, the change agent helps others learn to become more comfortable with their uncertainty and explore alternatives for change.

Change agents who learn to be aware of self and others are able to respond both appropriately and empathically to the thoughts and feelings of others. Change agents must, also, have a vision of the way to proceed to discover answers *with* others in lieu of having answers in advance. When a change agent is fully alive and responsive in this way, the energies and creativity of others is enhanced. Change becomes a life-sustaining force rather than a life-threatening phenomena.

Guy Billout

Change Agent:
An Advocate or a Methodologist?

by Ronald E. Fry

For those of us who see ourselves as educators, consultants, counselors, community leaders, activists, managers, coaches, helping professionals, etc., the process of effecting constructive change can be a frustrating experience. Trying to get others to do what we think they should, or helping them to do what they think they want to do, is a difficult task. In fact, both giving and receiving help can cause us serious misunderstandings. It may lead to outright emotional rejection by those we are seeking to assist or from those who are seeking to help us.

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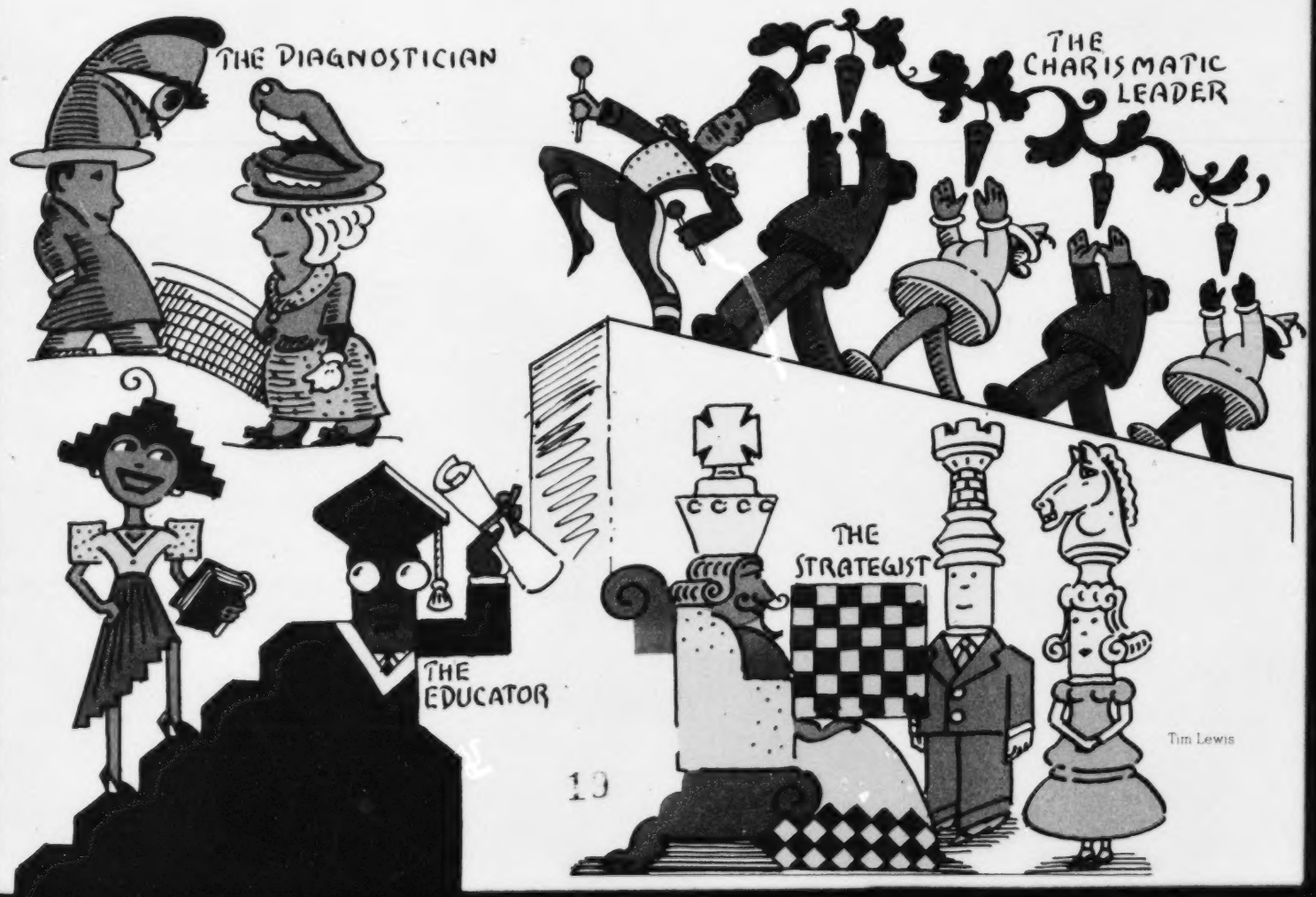
When we are successful in helping others to change, we deservedly take some of the credit for both our own and their success. But, when our efforts are less than successful, we tend to fault others or the environment: "They really didn't want to change anyway," "they were too resistant," or "unappreciative of our good intentions." At such times we tend to be reluctant to look at our own role and to determine the extent to which our own behaviors tended to impede the outcomes we sought.

Whether you are functioning as a manager trying to develop an organization, a teacher trying to change the health habits of teenagers, a parent trying to establish new family norms or an agency head trying to implement a new program, you are seeking to foster and implement change. As a result, you may choose to think of yourself as a change agent. A change agent must wear different "hats" during a change effort. You may play the expert at one moment and the listener-counselor at the next, or you may find yourself leading activities at one point and teaching others how to lead at another. Changing hats is not intended to cast the change agent into a variety of superficial roles, but rather for understanding a variety of ways to help individuals or groups examine alternatives and move toward achieving a more constructive situation. The need to wear different "hats" or to change roles calls for the effective change agent to acquire two basic skills:

1. The change agent must be able to "put on the right hat at the right time."
2. The change agent must be able to "change hats" without confusing or frustrating the people with whom he or she is working.

A Formula for Change

David Gleicher of Arthur D. Little has developed a formula for change that is particularly helpful in distinguishing both the different stages of a change process and how different roles or "hats" are appropriate for the change agent as



the process unfolds. The formula can be described as:

$$C = (a \cdot b \cdot d) > X$$

where **C** = Change
- **a** = shared level of dissatisfaction
- **b** = shared vision of an ideal state
- **d** = understood practical first steps toward a desired state
- **X** = the "cost" of changing, both monetary and psychological

This equation means that for change to be possible and for commitment to occur, there has to be:

- a felt need or enough dissatisfaction to mobilize human energy to change.
- a clear conception of what it would be like if the change under consideration took place.
- enough awareness of first steps to take in order to overcome the resistance in most individuals and organizations to change.

Which Hat Is the Right Hat?

Begin to identify specific choices for roles to try by asking yourself, "Which part of the change formula (a, b or d) should I be working on?"

Establishing a shared level of dissatisfaction (a)

If you believe you can facilitate the change process best by making the person or group aware of their own felt need to change, you might choose the following "hats" to wear:

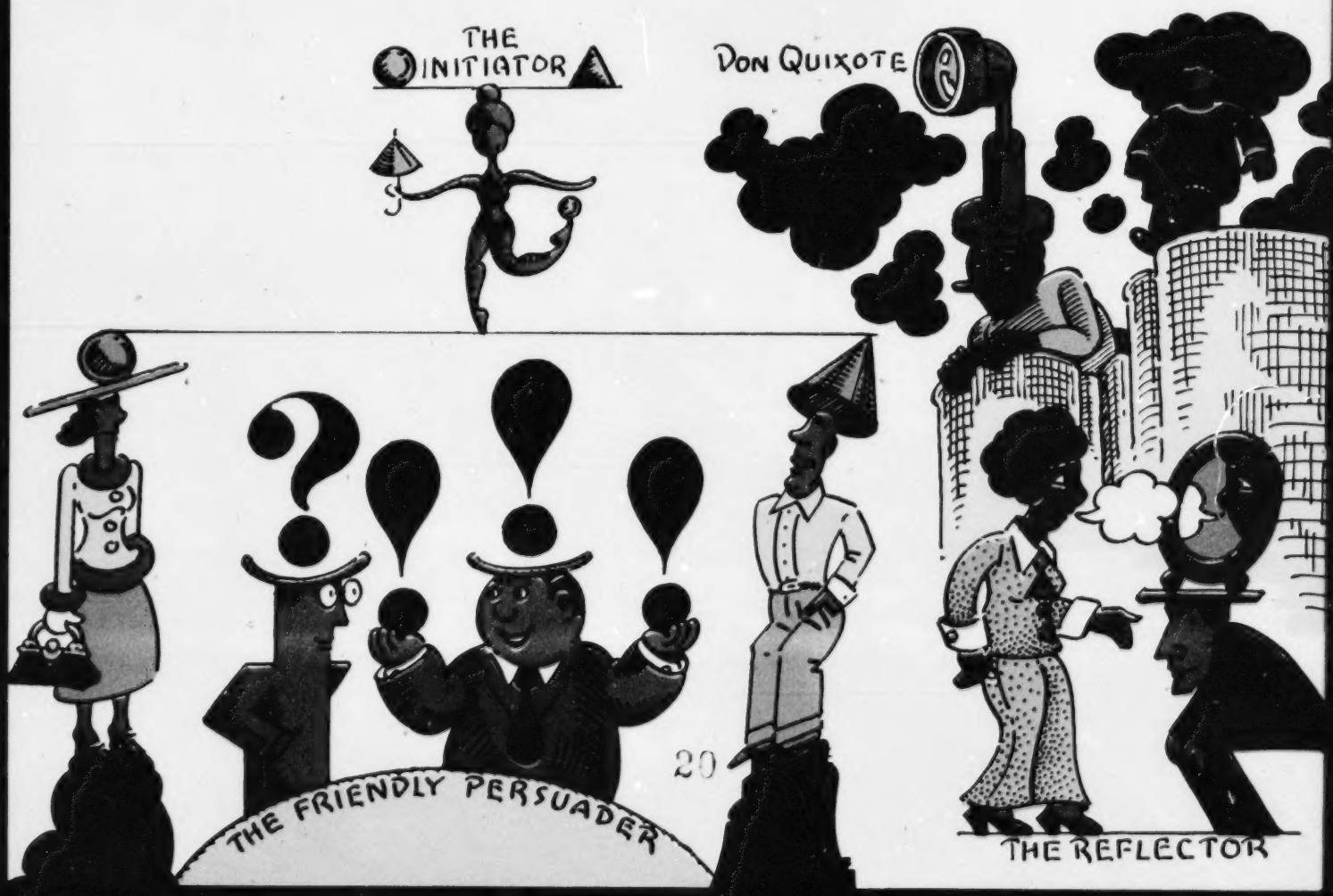
The Diagnostician—Much as a doctor who tells us why we hurt, this role can help identify basic reasons why people are upset. The change agent can probe beyond symptoms to look for common causes or, as in a checkup, can diagnose certain vital signs of the organization to check for any unhealthy indicators. If the symptoms are present, the Diagnostician can describe them to the group for their assessment, thus creating a sense of need to change.

The Reflector—When wearing this hat, the change agent acts like a mirror to feed back to people things they say and do. The Reflector watches, listens and then points out inconsistencies. In this way, individuals become aware of dysfunctional behaviors or attitudes. Unlike the Diagnostician who interprets the data, the Reflector allows others to interpret for themselves.

The Friendly Persuader—In this role the change agent acts on his or her own behalf to convince others of the need to change. The change agent tries to influence the changee by utilizing knowledge, facts or research to show why and how that person or system should change.

Establishing a shared vision of an ideal state (b)

The objective of this part of the formula is to reach a common direction among those who are expected to change



or to lead a change effort. Many efforts fall short due to a lack of commitment to the same "end point." A community board and physicians in a neighborhood clinic, for example, will most likely differ in their sense of "improved quality health care," unless they are helped to work together to define specifically agreed-upon indicators. Some "hats" available at this stage include:

The Don Quixote—Changees who are unable to see beyond their current problems or beyond the seeming odds of "the system" may benefit from this approach. Like an impossible dreamer, the change agent here is the fantasizer who keeps the group focused on wishes, ideals and dreams of what *could* be instead of reasons why it won't work.

The Charismatic Leader—While the Don Quixote helps others to identify their own goals, the Charismatic Leader, often working on his or her own behalf, helps others to achieve beyond their present capacity by expanding their perceptions of themselves. The group may be lacking in the drive to achieve or they may believe that it is not possible to overcome some resistant force. Like a General Patton, this role models the attitudes and goals necessary to attain the desired change in situations.

Determining initial action steps toward the desired state (d)

Here the change agent's objective is to demonstrate that it is possible to get to the desired state if the participants want to change and agree about what they would like to change. Try on these hats:

The Strategist—Like a schemer, this role helps the people involved to consider options, second guess themselves, and to anticipate different consequences of each step they plan to take. The strategist anticipates hazards, generates alternatives and plans a sequence of events.

The Initiator—This change agent role is concerned with helping the group get something done. The Initiator models whatever skill is required by doing what is needed or by taking the first risk.

The Educator—Wearing this hat means teaching people how to take a particular step or consider different ways to accomplish a goal. Rather than being involved to the extent of the Initiator, or even the Strategist, the Educator is a resource who focuses on developing the group's abilities to do whatever is necessary to bring about change.

It is appropriate and often necessary to change roles based on the kind of change issue you are working on (i.e., which part of the formula you feel needs bolstering). It is *also* necessary, however, to make sure others understand when you are in which role. Being the Initiator for a long time and then changing to an Educator or a Don Quixote, because you are worried about how committed others are, can confuse and frustrate those you are working with. They may interpret your behavior as evidence of loss of interest in the cause or an attempt to protect yourself in a risky situation. When this occurs, the frustration or uncertainty on their part will lead to skepticism and the "X" in our formula, people's inherent resistance to change, can take over and subvert the effort.

When in doubt about which role to take on, or when to change roles, ask yourself first which factor of the change equation you think you are working on. Then ask those you are working with how helpful they are finding your present role. This latter question is not an easy one to ask. To feel comfortable in requesting this kind of feedback demands a certain attitude about being a change agent and, hence, a final choice point for all of us to consider.

An Important Choice: Advocate or Methodologist?

In all the roles described above, the change agent can take the overall position of an *Advocate* or a *Methodologist*. The Advocate personally values and wants the change to occur. She or he persuades, leads, sets goals, takes risks, models behavior, etc. in order to show the way to get movement toward change. Most of us often find ourselves in this position. We are part of a group wanting to change or we want to change something ourselves. The trap for the Advocate is the tendency to forget that unless others have the same needs and goals, this person is likely to end up out on a limb without any constituents. Advocacy behavior alone can actually produce strong resistance to change.

The Methodologist, on the other hand, tends to focus on the *process* of change and how to help others through it. This type of change agent will help others to learn how to lead, to diagnose, to plan and so on. Group members gain a feeling of commitment through increased involvement.

Both approaches are necessary. While the role of the Methodologist tends to reduce resistance, the role of the Advocate often supplies the needed energy to get things going. A way to choose when to be one or the other is, again, to raise the issue openly with those who are crucial to the change effort. Since raising this kind of question is, in and of itself, a methodological intervention, I have a rule of thumb which I rely upon. It says that, "If I am concerned with method or process at least 51% of the time, then I am more likely to attain success in the long run." Success can be defined as a completed change which incorporates my views, the group's views and our enthusiastic commitment to the change we have created.

CONFLICT: A Climate for Growth?

by Margaret Gorman

The Manager

A senior manager in a well-established computer company is reflecting upon his past and future decisions. Every promotion, which he welcomed for the challenge, the increased income and the higher status, involved moving the whole family. Now he feels that he is a stranger to his teen-age twin daughters and his college-bound son. The vice-president of his division has been pressing him recently to give more time and involvement to the company. He wonders which is more important to him: relating to his family, especially his wife, or the potential for added income. How does his family feel? Since family communication has been strained lately, he does not know how he can find out....

The Homemaker

A young wife ten years out of college, with two children, ages three and five, is reflecting. After college, she got her Master's degree in education and had even received tenure after teaching several years. Her husband had to move because of his job. Then they had two children. Now both of the children will be going to school for part of the day. She would love to go back to work; perhaps teaching??? She worries that the children might need her when they come home from school and how will her husband feel....

The College Senior

A college senior is preparing resumés for job interviews. When starting college, there was a decision to major in political science, perhaps with a goal of going into law or government. Now, four years later, the prospects for government jobs are reduced, and law schools have very limited openings. Should hope and desire to be a lawyer be given up? Would business be a reasonable alternative? What kind? Grades have to be kept up in order to be acceptable for a job or for graduate school, yet what to do about work for next year...

All three persons in the previous examples, *The College Senior, The Homemaker,* and *The Manager* are experiencing conflict situations. The way in which they choose to deal with the crises they face will determine whether they will grow to a new level of awareness and maturity or whether they will stagnate and fail to develop. Conflict of the type portrayed in the three examples offers both a perceived danger and an opportunity for improvement. Often in seeking to avoid the danger (the conflict in the situation), we miss the opportunity presented to us. To understand this more fully, we must look at the underlying process of human development.

The Developmental Process

In the developmental process, growth occurs when an outside event cannot be absorbed or handled by existing structures. When a seed is planted, it encounters incompatible earth and reacts by breaking up and interacting with the new element.

So, too, the old or obsolete psychic structures or ways of seeing the world must break up to give way to new possibilities.

The German philosopher Hegel described this as a dialectical movement having three basic activities: dying (thesis), preserving (antithesis) and transforming or transcending (synthesis). Some of the old ways of acting must die out while others must be preserved. Some new ways must be adopted which may be contradictory to the old ways. And, finally, a synthesis of the old and the new must be formed to continue development. This new situation will not emerge if we totally give in to either side, the old or the new. It is the tension or conflict of both the old and the new taken together and harmonized effectively that produces the desired growth effect. In this process we must learn to question the values of others and form our own hierarchy of values which will serve us as guideposts along the developmental path on which we seek to travel.

In the example of *The College Senior,* he may need to de-emphasize reliance on peer standards and the value of belonging to a group. The skills that the college student developed to handle college situations such as tests, grades and dormitory difficulties are not adequate for the new problems of job interviews, job choices and being rejected. While in college, one might have succeeded by being popular or generous. Now the reality of the work world, of being judged by performance, must be acknowledged. As one looks at the business world, some of the realities must be preserved.

Yet, if *The College Senior* is to grow, neither the values of college life nor those of the business world should dominate. To remain a college student is no growth; neither is it growth to conform to the work world without critical evaluation. The resolution of the potentially conflicting values of both worlds will stimulate growth and change.

The same predicament is faced by the young woman. Her way of living as a "housewife and mother of young babies" is challenged by her children's increasing maturity and self-reliance. As she is freed from her children's constant need for her, her inner desire to achieve conflicts with the more traditional views of motherhood which have been unconsciously transmitted to her by society. Can she preserve the best of what she values as a parent and the best of what it means to fulfill other aspects of herself? This will be growth. To give in fully to her desire to develop herself or her need to follow out past examples of motherhood, without creating her own lifestyle model, would be to remain stagnant.

Why do we hesitate to grow? Why is it that, as the late Abraham Maslow said, given the choice between growth and security, we choose *security?* What more can we learn from the developmental process? Our previous way of looking at the world or even ourselves must be discarded. This is not easy. The college student must give up the college role. The young woman must give up her "mother of babies" role. The senior manager contemplates altering a role which engulfed him, in order to place that role in proportion to his role as family man, father and husband. Growth does involve the loss,

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even the dying of the previous self. Or, is it rather the previous *role?*

A Crucial Distinction between Self and Role

There is a need to distinguish between self and role if we are to understand both the fear of growth and the positive value of growth, even when loss is involved. Roles are behaviors dictated by society for people in certain positions. The self develops when persons, significant others, react to us. Self is at the base of the roles we assume and shines through them. Roles can and must change, be discarded and be added. The self grows as it works through these roles while the roles themselves change.

But, most of us *perceive growth* as the death of the *self* not as the death of the *role*, and therefore we resist. Sometimes it is necessary to cut back all the leaves of a plant, all the roles, in order that the real plant or the real self can grow.

Fear of growing, then, may be due to the fact that we cannot distinguish between our roles and our selves. This points up the basic difference between human psychological growth and physical growth, between the growth of natural systems and the growth of social systems. In physical development, the organism instinctively removes the unneeded. Digestion is an excellent example of this. But in human cultural organizational and individual development, we must make conscious decisions about the dying, the living and the transforming. And as we grow psychologically, we become less dependent upon security or belonging needs. We begin to develop the capacity to know what is truly part of our self and the meaning of being human.

The same is true of social organizations. They are not organisms where dying, preserving and transforming take place naturally and without thought. Organizations consist of people who must consciously choose what should die and what should be preserved in order that the best of the old and the best of the new can be transformed.

It is important to see that growth, either on the individual or on the organizational level, will never occur if it is perceived as the death of the self or of the organization. To be a "change agent" for organizations or an educator (in the sense of the Latin word "educare" to lead out or stimulate) need not mean either to indoctrinate or to revolutionize. It may well mean to "be there" at the time of conflict, helping persons and organizations to *preserve* what is best from the past, to *remove* what is unnecessary in the present and to help in the transformation toward a more suitable future situation.

Experiencing Change:

Windows on Self

by Philip G. Hanson

If the change agent can help group members move toward sharing thoughts and feelings, communication barriers will be lowered. Dr. Hanson adapts the familiar Jo-Hari Window to help us gain insight into our own and others' communication problems.

One of the major characteristics of contemporary society is change. Change is a continuous process occurring everywhere and in everything from tiny organisms to far-flung galaxies. Even what appears to be static is constantly changing. In human beings change can be seen as exciting and desirable, or it may be perceived as extremely threatening and something to be avoided. Change always involves some conflict or stress. As a consequence, any program for change, whether it involves whole social systems or individuals, is usually accompanied by resistance to the change itself. Resistance to change may take many forms, from outright rejection to attacking, to being confused, to not hearing or seeing, to misunderstanding, to forgetting, to being right and to justifying or explaining your own position. It is important to recognize that resistance is not an isolated phenomenon but has a background and history that may be embedded in cultural norms which are violated by any change program. It is helpful, therefore, to accept resistance and the feelings behind it as a legitimate reality and to work with it from there. To meet resistance with antagonism or win/lose strategies may be counter productive.

We are accustomed to thinking of change as some kind of action that we have to take which will produce new behaviors and attitudes consistent with some desired goal or model. Change, however, may occur as a by-product of an attitude and a process. The attitude is one of assuming complete responsibility for your experience. That is, you create whatever experience you have had in the past, are having in the present and will have in the future. Since all experience originates with you, only you can change that experience. If experience is caused by external events, then you have no control over changing those events. You cannot change another person, you can only change yourself. As a by-product of your change, however, the other person may change his or her behavior.

Assuming Personal Responsibility for Change

1. Being Aware. Awareness involves being alert to what is going on with you and with others *now*. Awareness also involves being attuned to what is going on with others by focusing active attention on them. Being aware is paying attention to what is happening *here* and *now* rather than attending to the "noise" in the back of your mind. It is also difficult to be aware of the now when one's attention is focused either on the past or the future. Being aware requires a willingness just to *be* with the other person and to *be* with yourself and *experience what is happening.*

2. Accepting. Acceptance means accepting what *is* without evaluating or judging how it should be, whether or not it is right or wrong, good or bad, or trying to justify, rationalize or make sense out of whatever experience you are having. If I can avoid evaluating myself as good or bad or justifying my behavior in terms of some historical antecedents, then I can change that behavior. If I can accept another person without evaluating that person as good or bad, then I can create a climate which will make it safer for that person to change, or not change, as one wishes. The principle here is that behavior which is constantly defended is not likely to change.

3. Sharing. One purpose of sharing is to get other people to listen and to understand what it is you are trying to communicate. This purpose does not involve getting others to agree or disagree or to evaluate what it is that you are sharing. During the process of sharing, feelings may change and perceptions may shift solely as a consequence of *hearing* yourself and experiencing your own act of communicating.

Sharing may also involve using others as sounding boards for reactions and feedback regarding their feelings and perceptions. What you do not share tends to remain inside in a state of incompleteness. What you share openly tends to become a completed experience for which you can feel a sense of closure. For example, think back on interactions you have had which were frustrating or upsetting. They usually involved something

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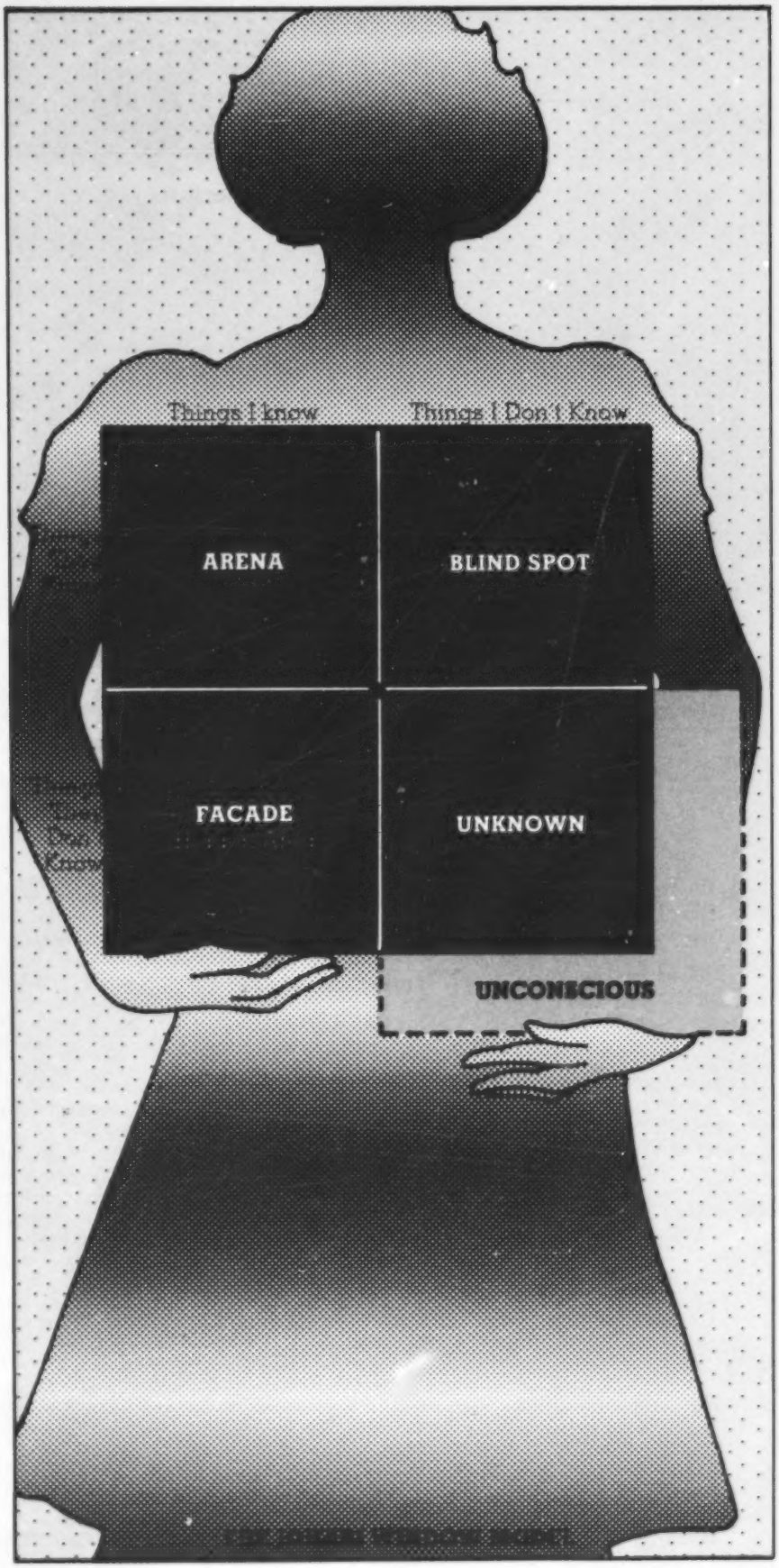


that you did *not share* with the other person in terms of your feelings, expectations or thoughts. What usually happens then is that you are obsessed by what you should have done or said or you continue to work out the interaction to a satisfactory completion in your fantasy. The process of sharing helps you to become clear about your intentions and completes an experience with the other person. You are then able to communicate more clearly.

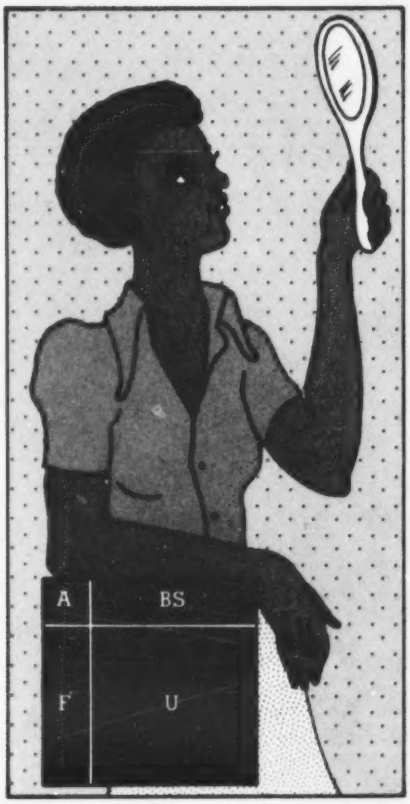
In summary, change does not have to be a conscious effort to modify behavior. It may be a by-product of a greater awareness of your own experience, your willingness to accept that experience as real for you and others, a willingness to share your experience and to experience this sharing as it is occurring here and now. A fully completed experience provides the space to change or create a new experience.

Change through Increased Awareness

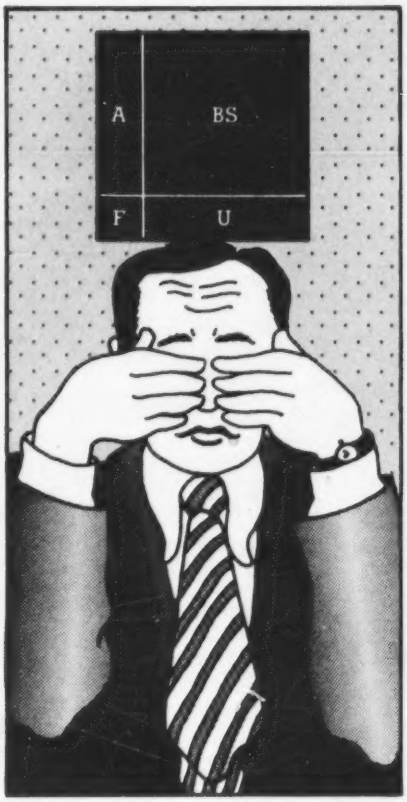
The Jo-Hari Window has long been used as a model for looking at the potential for increasing one's level of awareness and acceptance through the process of sharing. The Jo-Hari Window was originally developed by Joseph Luft, a social psychologist, and Harry Ingham, a psychiatrist, for their program in group process (Luft, 1963). The model was modified by the present author to illustrate the process of giving and receiving feedback (Hanson, 1973) and is adapted in this article to illustrate the processes of being aware, accepting and sharing. As such, it provides a critical personal dimension to the change process.

Giving feedback, or disclosing oneself, is a verbal or nonverbal communication to a person or group providing them with information about how their behavior is affecting you, your here-and-now feelings and perceptions. Receiving or soliciting feedback is getting the feelings and perceptions of others as to how your behavior is affecting them. The diagram illustrates four panes of a win-

Beatrice Fassell



Large Unknown.



Large Blind Spot.

dow which describe yourself and your interaction with others.

The first pane, called the Arena, contains things that I and others know about myself. It is an area characterized by free and open exchange of personally relevant information between myself and others. The behavior here is public and available to everyone.

The second pane, the Blind Spot, contains information that I do not know about myself but of which others may be aware. As I interact with others I communicate all kinds of information of which I am not aware but which is being picked up by them. This information may be in the form of verbal cues, mannerisms, the way I say things or the style in which I relate to others. The extent to which we are unaware of much of our own behavior and what it may be communicating to others can be quite surprising.

In pane three are things that I know about myself but of which others are unaware. For one reason or another I keep this information hidden from them. This pane is called the "Facade" or "Hidden Area." My assumption may be that if I start revealing my feelings, thoughts and reactions, others might judge me negatively. As a consequence, I withhold this information. I cannot find out, however, how others will really react unless I test these assumptions and reveal something of myself. In other words, if I do not take some risks, I will never learn the reality or unreality of my assumptions. On the other hand, I may keep certain kinds of information to myself when my motives for doing so are to control or manipulate others.

The last pane contains things that neither myself nor others know about me. Some of this material may be so far below the surface that I may never become aware of it. Other material, however, may be below the surface of awareness for both myself and others but can be made public through an exchange of feedback. This area is called the "Unknown" and may represent such things as early childhood memories, latent potentialities and unrecognized abilities. Since the internal boundaries can move backward and forward or up and down as a consequence of soliciting or giving feedback, it would be possible to have a window in which there would be no Unknown. Since knowing *all* about one's self is extremely unlikely, the Unknown in the illustration is extended to show that part of it will always remain unknown.

The information contained by the Jo-Hari Window is not static but moves from one pane to another as the level of mutual trust and the exchange of feedback varies. As a consequence of this movement, the size and shape of the panes within the window will vary.

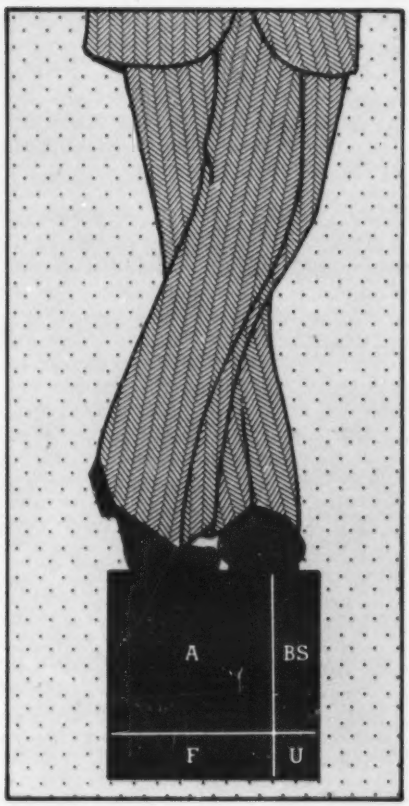
One way I can increase my awareness of myself (reduce my Blind Spots) is to get feedback from others, i.e., move the vertical line to the right. This requires a receptive attitude. I need to attend to and get clear on what others are communicating to me without evaluating their reactions or defending my behavior.

In order to increase others' awareness of me (reduce my Facade), I need to share with them what my feelings and reactions are, i.e., move the horizontal line downward. When I share myself, there is less need for others to interpret or guess what my behavior means.

In the process of giving and receiving feedback, i.e., reducing my Blind Spots and Facades, the size of the Arena increases. The size and shape of the Arena, therefore, is a function of both the amount of feedback shared and the ratio of giving versus soliciting feedback. The potential for increasing levels of awareness about myself and others thus can be illustrated by the size of all four panes.

1. Lowest potential for increasing the level of awareness. Large Unknown. A large Unknown represents little or no sharing of my own experience or checking with the experience of others. What is real for me is not shared, and what is real for others is not solicited. A large Unknown may represent an unproductive turning inward toward myself in which the primary focus is not to change but to defend against change. Energy used to maintain the barriers is not available for creativity and exploration. As a result, untapped resources remain under wraps. By not sharing my own experience and testing it against the experience of others, I may develop private myths about my-

Large Facade.



Large Arena.

self and others. Not knowing what I am, I do not know what I can become. The low level of interaction with others decreases the potential for increasing awareness.

2. Moderate potential for increasing awareness. Large Blind Spot. A large Blind Spot indicates that I am giving feedback but not soliciting or receiving feedback. That is, either the feedback is not given or not heard. As a consequence, I may appear insensitive to my impact on others. Giving feedback is in the form of "dumping" rather than sharing experience. Information from others, critical to increasing self-awareness, is not available to me. Not hearing from others, I am tuned in to my own "noise," which further interferes with listening. Much of my feedback, therefore, may be in the form of expectations/demands on others or may come across as evaluative and judgmental. My insensitive style may alienate others and further increase my isolation or decrease my availability to the feedback from others. By interacting with others, I increase my opportunities for greater awareness. I do not get, however, the experience others have of me, thereby decreasing the potential for awareness. As a result of this one-way communication, I may continue to behave in ways which alienate others and which provide no data base for change.

Large Facade. A large Facade indicates that I am not sharing my own experience but rather spending my time getting feedback or information from others. My unwillingness to share my experience may be due to fear of negative feedback or a need to maintain a particular image. As a consequence, I need to ascertain where others are first before committing myself, and thus I am frequently stuck with an incomplete experience. For example, if I handle an interpersonal conflict situation unsatisfactorily and do not communicate my feelings or thoughts at the time, the experience of the situation remains unfinished. I am then forced to complete the experience in fantasy or in repeated ruminations of what I should have said or done.

Soliciting feedback enables me to increase my awareness of others' feelings and perceptions of me. This awareness, however, may be biased by the fact that others have a limited experience of me because of the facade that I maintain. In addition, the awareness that accrues from the act of sharing my own experience is not available to me.

3. Highest potential for increasing level of awareness. Large Arena. The large Arena indicates that I share my own experience of myself and others and solicit from them the experience they have of me and of themselves. This mutual exchange of feedback increases my awareness of how others experience me and how I experience myself. This sharing enables me to get unstuck from my own point of view and to experience the other person's position. My willingness to share may be a reflection of greater acceptance of what *is* for me and what *is* for others. There is then less need to be evaluative of myself and others. This two-way communication provides the data which facilitates awareness.

The free and open exchange of feedback increases my awareness of my own experience and the experience of others as it is happening in the here-and-now. This willingness to share facilitates a greater acceptance of what is real for me. As a consequence of greater acceptance of what is real for me, the potential for change is greater. A major pay-off in sharing is that it enables me to complete each experience rather than to be stuck with it. I can then move on to creating new experiences.

Change is a here-and-now phenomenon and cannot occur either in the past or the future. When instituting any change you cannot bypass the present by moving from the past to the future. The only way you can change a behavior in the future is to start changing that behavior now. The key to change is to *be* in the present, to experience what is happening and to choose or not choose what one needs to do.

Luft, J. *Group Processes.* Palo Alto, Calif.: National Press, 1963.

Hanson, P. G. The Jo-Hari Window: A Model for Soliciting and Giving Feedback. In J. W. Pfeiffer and J. E. Jones (eds.), *The 1973 Annual Handbook for Group Facilitators.* La Jolla, Calif.: University Associates Publishers, 1973, pp. 114-119.

Getting Started

You may be feeling like we did after our first exposure to our authors' advice about being an effective change agent as well as advocate. "How do I start planning for change and keep all these suggestions in mind?" ¶ We began by thinking about the changes we are advocating. Had we clearly defined the problem from our perspective, the goal and the reasons we felt strongly about it? ¶ Then, we considered our change agent "hat." We know some changes can be made easily, some are more difficult. Perhaps some are impossible for us, but not impossible for others. We kept in mind that if no one starts the ball rolling in the first place, things are likely to remain the same for a long, long time. We directed our change efforts toward getting others involved. And, that's what this issue of FORUM is all about—understanding how to get others involved, excited and fully participating in making informed decisions about issues that are important to them. ¶ Gaining ability to bring about constructive change takes practice. Those who have learned to manage change efforts reminded us that they have experienced plenty of failures. Successful people, in the face of failure, ask, "What happened? What can we do next time to change the results from failure to success?" We learn from both the successful and unsuccessful experiences. ¶ So, we resolved to start small, but start. Be willing to fail, but learn. Try again and again until we develop the skill and ability to involve people in working toward the changes we believe are important. It is clear that the secret of bringing about changes with others is to be willing to constantly change ourselves and adapt to new circumstances or needs. We invite you to use this worksheet to plan your change effort. ¶ **Organizing for Change.** *One of the most important things a change agent can do is plan. A plan prepares the change agent to facilitiate group involvement in the change/problem-solving process.* ¶ *Dr. Malcolm Knowles' six-step process for creative problem solving (page 10) is one way we suggest for thinking through a plan of action.*

1. Climate Setting

How will you help establish a feeling of openness and trust?

What physical-setting factors can you adjust to enhance comfort and communication?

How will you plan to keep sides from polarizing?

2. Mutual Planning

How will each member or faction be assured an opportunity to help plan for the change?

How might others perceive the situation?

What are the major questions which will need resolution?

Can you anticipate "hidden agendas"?

3. Assessing Needs

What will be the major needs of the individuals involved, the organization, the larger community of which the organization is a part?

How can you plan to help the group explore competing needs and reach a balance?

How will you manage wearing two "hats," both as an advocate for the change and as the change agent?

4. Setting Objectives

(When you reach this stage, all should have voiced their needs and helped plan how the group will work through the changes needed. If there is some difficulty reaching consensus on objectives, steps one through three may need further attention before proceeding.)

How will you be sure each person has a voice in helping to set the change objectives?

What will you do if there are still objections as the group tries to define the problem in a positive way?

5. Designing and Implementing the Plan

What might you suggest as ways the group might work to plan change?

If objections surface again as the group works toward the change objective, how will you respond?

What will you do to help the group reach agreement on the suggested plan?

As change is designed, how can you help build in an implementation plan?

Can you include an on-going assessment to alert everyone to the initial problems which will need immediate attention?

6. Evaluating

As the change is implemented, how will the group focus on newly emerging needs?

How and what will the group measure as progress?

Can you find others in the group to share some leadership as the group begins to work through additional problems?

Bibliography

Ed. Note: *Each FORUM author contributed resource suggestions which have been assembled on this page. Their annotations may be helpful in choosing resources to further your interests in the issues in each article.*

Beckhard, Richard. "Strategies for Large System Change." In *Sloan Management Review*, Vol. 16, No. II, Winter 1975.
This guide provides an overview of change planning in a large system.

Bennis, Warren, Kenneth Benne and Robert Chin. *The Planning of Change*. New York: Holt, Rinehart & Winston, 1968.
Forces that produce controversy and strategies for dealing with them are the focus of this manual on change.

Eiben, R. and A. Milliren, eds. *Educational Change: A Humanistic Approach*. La Jolla, Calif.: University Associates, 1976.
This book offers very readable, practical discussions and examples of small group experiential exercises for change agents in any setting.

Gibb, Jack R. *TRUST: A New View of Personal and Organizational Development*. Los Angeles, Calif.: Guild of Tutors Press, 1978.
This is a general statement of Trust Level theory and its application to all aspects of human behavior.

Hanson, P. G. "The Jo-Hari Window: A Model for Soliciting and Giving Feedback." In J. W. Pfeiffer and J. E. Jones, eds. *The 1973 Annual Handbook for Group Facilitators*. La Jolla, Calif.: University Associates Publishers, 1973.
The author explores and adapts the Jo-Hari Window as a communication tool.

Harrison, Roger. "Role Negotiation: A Tough-Minded Approach to Organization Development." In W. Dennis, D. Berlew, E. Schein, F. Steele, eds., *Interpersonal Dynamics*, 3rd Ed. Homewood, Ill.: The Dorsey Press, 1973.
This article discusses how to negotiate a role relationship with people you are trying to help change.

Harvey, Jerry B. "The Abilene Paradox: The Management of Agreement." In *Organizational Dynamics*, Summer 1974, pp. 63–80. New York: AMACOM, Division of American Management Association.
The complete theory of the Abilene Paradox is found in this article.

_____. "Organizations as Phrog Farms." In *Organizational Dynamics*, Spring, 1977, pp. 15–23. New York: AMACOM, Division of American Management Association.
For those who choose to go to "Abilene," an alternative description of the location is found in this article.

Ingalls, John D. *Human Energy: The Critical Factor for Individuals and Organizations*. Reading, Mass.: Addison Wesley, 1976.
Human energy forces can be controlled and guided to increase creativity and minimize human destructiveness. Examined are fundamental processes of learning, change, development and growth.

Johnson, D. W. and F. P. Johnson. *Joining Together*. Englewood Cliffs, N. J.: Prentice-Hall, 1975.
Change agents working with young people in or out of a classroom may find this a helpful guide for group work.

Lewin, Kurt. *Resolving Social Conflicts*. New York: Harper and Row, 1948.
This is a scientific study of social conflict and classic foundation in group theory.

Maslow, A. *Farther Reaches of Human Nature*. New York: Viking, 1971.
This is a posthumous collection of the best of Maslow's later articles. The articles on "Neurosis as a Failure of Personal Growth," "Synergy" and one entitled "Metamotivation" are particularly helpful in understanding the difference between material security and human growth.

Ornstein, R. E. *The Psychology of Consciousness*, 2nd Ed. New York: Harcourt Brace Jovanovich, 1977.
This book discusses the limits of scientific knowledge and technology and urges the integration of the two modes of consciousness—analytic and intuitive.

Perls, Fritz. *The Gestalt Approach and Eye Witness to Therapy*. New York: Bantam Books, 1976.
Although the Gestalt approach stems from a therapeutic model, it is applicable to all human beings. The primary focus of this point of view is to increase *awareness* of *here* and *now* events and accepting these events for what they are before moving on.

Pfeiffer, J. W. and J. E. Jones. *Annual Handbook for Group Facilitators*, Vols. I–VI. La Jolla, Calif: University Associates, 1971–1978.

_____. *Handbook of Structural Experiences for Human Relations Training*, Vols. I–VIII. La Jolla, Calif.: University Associates, 1971–1978.
These volumes have hundreds of small group exercises and discussions of small group work for any type of organization.

Robinson, Jr., J. W. and R. A. Clifford. *Conflict Management in Community Groups*, 1974. Available from: Department of Agricultural Economics, 305 Mumford Hall, University of Illinois, Urbana, Ill. 61801.
This booklet is a learning module on conflict management. It contains information and activities for practicing the skills of a change agent.

Rubin, I., M. Plovnick and R. Fry. *Task Oriented Team Development*. New York: McGraw-Hill, 1978.
This is a programmed guide and materials for developing and changing work groups.

Stanford, G. and A. E. Roark. *Human Interaction in Education*. Boston, Mass.: Allyn and Bacon, 1974.
This volume is especially designed for group-centered classroom learning.

Resources in Consumer Education

Current thinking in consumer education is brought together in the multi-media CONSUMER EDUCATION MODULES pictured on this page. The four-part series was developed over a two-year period with the guidance of a nationally known consumer education advisory board.

A basic ecosystem philosophy, that we all affect and are affected by each other, ties the modules together. Each package takes an in-depth look at one area of consumer education, providing reference material and suggested activities to help educators integrate each concept into local consumer education programs.

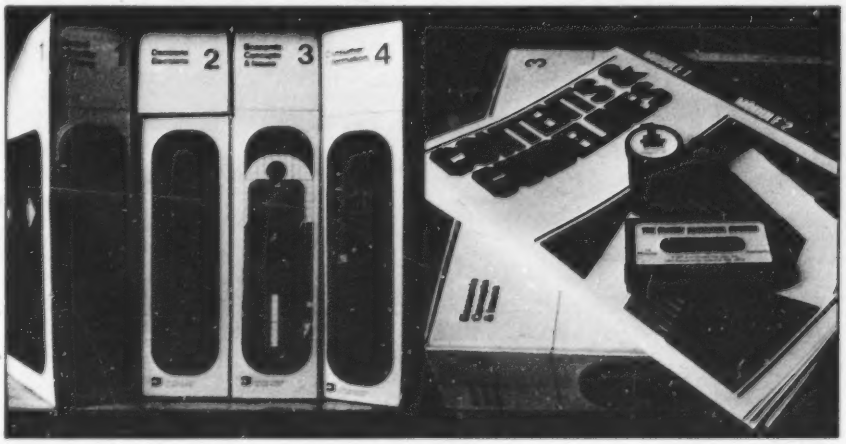
TOWARD A QUALITY OF LIVING is concerned with the reciprocal effects of decisions about resource use on the human-made, natural and human relations environments.

DECISIONS, DECISIONS explores decision-making and communication skills through numerous interactive experiences, colorful posters and a game.

ECONOMIC CONCEPTS & ISSUES introduces basic economic concepts and principles, utilizing a humorous filmstrip dialogue and a wide variety of activities on many educational levels.

CONSUMER INFORMATION investigates the process of finding and using marketplace information through activities which involve participants in analyzing their own purchasing behavior.

The *Modules* and other teaching units are available on free loan from your local JCPenney Store manager.



FORUM is one of a group of educational publications and teaching units that JCPenney stores provide for consumer educators in their communities as a public service. It is published twice a year as a resource which focuses on emerging consumer issues.

All educational materials are prepared in the Educational Relations Department of the New York Office by consumer educators. Visits to and discussion in communities across the United States help the staff to identify trends and issues critical to consumer education.
JCPenney stores provide this service because we as a company share with other citizens in each community a concern for the quality of life. We believe we have a responsibility to contribute to the social and physical environment of the communities in which we do business.

If you are an educator in a community where there is a JCPenney store, contact the manager of that store to ask for these materials. Single copies of current publications are available from the store manager free of charge, and educational resource units may be borrowed from the store lending library. If there is no JCPenney store in your community, you may write to the Educational Relations Department of the J.C. Penney Company, Inc., 1301 Avenue of the Americas, New York, New York 10019 for a brochure which describes our educational materials.

JCPenney Educational Materials Fact Sheet

Fall/Winter 1978

How to Obtain These Materials

This listing is updated every January and July. New materials are added and outdated ones are removed. Periodic price adjustments reflect increased production costs. Be sure to use the current fact sheet when ordering educational materials. The latest listing may be obtained by writing to the address on the back of this page.

Forum and Insights Into Consumer Issues

The Manager of your nearest JCPenney store makes available to consumer educators a single copy of *Forum* and *Insights into Consumer Issues* free of charge. Subscriptions are not available for publications.

Filmstrips and Teaching Units

The Manager of your local JCPenney store will provide units to consumer educators on a loan basis.

If There Is No JCPenney Store in Your Community

You may order any of these educational materials at production cost from the New York Office by using this fact sheet. Use this listing for quantity orders or to obtain additional materials for your personal library. We are unable to send material for preview purposes or on approval.

Other Services

Make yourself and your work known to the JCPenney Manager in your community. If you need to borrow merchandise for lessons, want to arrange a tour of a store for a class project, or have any other special request, do not hesitate to ask. The Manager is always happy to be at your service.

Description

New Publications
Fall/Winter 1978

Forum
≠85365 Cost: $1.25
Managing Change
How do you help people grow and change? Consumer educators often function as change agents as well as advocates in the classroom, community and family. This issue of FORUM brings together information about the nature of change and ways those involved in change can be more effective in their roles.

Insights Into Consumer Issues
≠85366 Cost: $1.00
Personal Privacy In An Information Society: What Are The Trade-Offs?
Our computer-based information society has created massive storage systems of information on individuals, causing the issue of protection of personal privacy to become increasingly complex. What are the trade-offs and implications of this question for our lives today and in the future?

This folder contains:
- background information
- ten-frame filmstrip and commentary
- poster
- community involvement activities for small and large groups
- summary sheets of business, consumer and government perspectives on the privacy issue
- information sheets on privacy legislation and computerized information systems

Looking For Me: Understanding Consumer Behavior in the Marketplace
≠85367 Cost: $15.00
Twelve sequential learning activities draw on individual experiences and feelings to demonstrate how self-concept and basic human needs relate to consumer behavior. A 68-frame filmstrip, "A Consuming Need to Know," uses a musical introduction to facilitate student involvement and develops the overall concepts of the unit. A poster illustrating basic human needs coordinates with the activities. This material can be used with both junior high school and older adolescents, and is adaptable for use with adults.

Impressions: Who Do You Think I Am?
≠85369 Cost: $5.00
First impressions are a composite of the way others perceive physical cues such as: body build, body movements, facial expressions, voice and clothing. Through a ten-minute filmstrip with cassette, a mime illustrates the meaning of each cue. Questions about the possible effects of personal image are explored in the context of a job interview, salesperson/customer interaction and social situations.

Consumer Education Modules

Consumer Information
≠85136 (1977) Cost: $19.00
This teaching kit investigates the relationships between consumer information, consumption patterns and quality of life. Included in this multi-media kit are "Finding Out," a 60-frame filmstrip with cassette tape, a booklet of case studies, a poster which illustrates use of information in decision making, ten activities, and a guide for educators.

Economic Concepts & Issues
≠85028 (1977) Cost: $19.00
The objective of this material is to provide a basic understanding of economic concepts, goals and issue analysis from a family ecosystem perspective. Activities include value continua, case studies, an auction, cost-of-living comparisons, a job survey, 4 posters and ideas for additional activities. A 65-frame filmstrip with cassette, "The Family Economic System," defines the family as an economic unit by relating family and business economic functions.

Decisions, Decisions
≠84965 (1976) Cost: $19.00
More than 40 interactive activities explore decision making and communication as essential consumer skills. Included in this unit are a communication game, role-playing scenarios, simulations, case studies, improvisations, listening tape, activity sheets, posters and an interactive dialogue.

Toward A Quality Of Living
≠84918 (1976) Cost: $19.00
This multi-media teaching kit focuses on the family ecosystem as a model for understanding the influence of goals, values and resource availability on consumer choice. Two filmstrips and cassettes consider the environments in which consumers live and the effects of their choices on the ecosystem. The unit contains family picture cards, posters, activities and a Spanish translation of the filmstrip commentary.

Educational Resource Units

Systems: An Approach To Consumer Education
≠85295 (1978) Cost: $16.50
As consumers, learning about systems is a starting point in developing a global view of our world. Energy, central to all systems, is the focus of the learning strategies included in this unit. A 45-frame filmstrip, "A Declaration of Interdependence," introduces the concepts of interdependence and holistic thinking. A second filmstrip builds on and expands these concepts. Chalk talks, suggested transparencies and a poster coordinate with the learning strategies and filmstrips to clarify the relationships of consumers to the system in our environment.

Your Space And Mine—A Behavioral Approach To Environments
≠84776 (1975) Cost: $14.00
This unit investigates the interrelationships of personal space, sensory cues, environmental messages and personalization of surroundings. Personal and family relationships in the environment are related to crowding, privacy needs, socialization and continuity of family cultural heritage. Contents include:
—3-part filmstrip and cassette
—14 activity sheets
—poster
—educator's guide

Parenting: Fathers, Mothers & Others
≠84698 (1975) Cost: $18.00
This multi-media teaching unit looks at parenting, i.e., relationships between human beings whatever their age and kinship. Concepts included are: parenting, the basic rights of children, universally shared needs, learning to parent, and communication skills. Contents include:
—3-part filmstrip and cassette
—posters
—action-awareness activities

Nutrition—What's In It For You
≠84574 (1974) Cost: $18.00
This multi-media unit explores the relationships of nutritional awareness and attitudes to eating patterns, how diet affects health, weight control in your lifestyle, and the function and use of nutritional labeling. Contents include:
- —4-part filmstrip and cassette
- —14 activity sheets
- —poster and gaming activities

Career Development: Education For Living
≠84523 (1974) Cost: $14.50
Prepared to help students gain awareness of attitudes, beliefs and real values related to work and leisure, this unit includes:
- —3-part filmstrip and cassette discussing the development of work values and the importance of self awareness and career awareness
- —8 picture cards to be used independently or with the filmstrip
- —a career case study—3 overhead transparencies
- —8 action-awareness activities, including 4 colorful posters

Me, Myself & I: How Preschoolers See Themselves
≠84136 (1973) Cost: $16.50
Designed to help preschoolers see themselves as worthy, trusting and creative persons, this unit also helps people who work with preschoolers to gain understanding and confidence in their role. Contents include:
- —a guide
- —picture cards
- —records
- —puppets and flannel board objects

An Introduction To Value Clarification
≠83950 (1972) Cost: $11.50
Based upon the process of value clarification, these strategies are designed to stimulate thinking. Contents include:
- —a guide
- —FORUM magazine on Value Clarification
- —7 folders containing overhead transparencies
- —worksheets
- —flash cards and posters

Awareness: Insight Into People
≠83657 (1970) Cost: $12.00
Designed to improve understanding of ourselves and others, this unit includes:
- —"Becoming Aware" (filmstrip and record)
- —Case studies—a learning experience
- —"Being Aware" game

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Spanish Materials

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	FREE	**85368** Fact Sheet Fall/Winter 1978

Description

Filmstrip Cassette Kits

Human Energy... How To Move A Mountain
= 85294 (1978) Cost: $4.00
"Human Energy... How to Move a Mountain," complete with king, castle, grand vizier and subjects, is an 8-minute filmstrip and cassette tape which uses a fable format to explore two generally identified human behavioral patterns. Considered are obstacles in our accepted patterns of behavior which can interfere with achieving satisfaction in interpersonal relationships. The filmstrip also suggests that an understanding of these behavioral patterns can lead to increased productivity and a reduction of conflict.

Taking Issue
= 85137 (1977) Cost: $3.00
This 60-frame filmstrip and cassette tape investigates the dimensions of consumer issue analysis.

Fire, Fabrics And You
= 84777 (1975) Cost: $5.00
This 12-minute filmstrip and cassette explores flammability legislation, common causes of household fires, meaning of flame resistant, and flammability testing procedures for fabrics.

Safe-Toy Environments
= 84697 (1975) Cost: $6.00
The role of toys in the physical, sensory, mental, emotional and social growth of children is explored in this filmstrip and cassette. Emphasized is the selection and evaluation of toys for safety.

The Metric Song
= 84575 (1974) Cost: $4.50
The language of metric is presented in a lively original song on cassette tape. Contemporary visuals illustrate the metric message in a 30-frame filmstrip.

Preparing For An Interview
= 83192
(Revised 1974) Cost: $6.00
This filmstrip and cassette present how to evaluate personal qualifications for a job, appropriate dress, and what questions might be asked in an interview.

Are You Listening?
= 83830 (1971) Cost: $4.50
This six-minute cassette tape evaluates how well we listen. Listening experiences include:
- —a personal telephone conversation
- —an interview
- —following verbal directions